

Revision Notes for Tradex

Jan 17, 2023

NOTE: This is an abridged version of the revision notes for unregistered users.

NOTE: If you're upgrading from version 1.1.3 or before, you will probably have to trash the Tradex Preferences file in the System Folder, or you will get a message stating that "Tradex is corrupted."

1.0

Original version

1.0.1 10 January 1994

- Better identification of Macintosh model and colour capabilities.
- Import and export (Save, Load and Merge) of tab-separated files with proper dates to enable import/export of Excel data files.
- Recalculation of min/max values on closing of data update window.

1.0.2 28 April 1994

- Colour icons.
- Minor changes to be compatible with the Recoder application.

1.0.3 16 May 1994

- Removed various "features" that were potentially causing problems on some Macs. These features were internal and

do not affect the application as far as the user is concerned.

- Tradex now stores the preferences file in the Preferences folder under System 7. For some reason this seemed to worry and/or confuse a number of users.

1.0.4 21 June 1994

- Some internal changes to try and alleviate user-experienced bugs. Still problems with System 7 file management. Unfortunately the solution is a **major** fix, which I can't do right now!
- Bug with printing data window (only one page would print) fixed.

1.0.5 6 July 1994

- By popular demand, the Preferences dialog (**Preferences...** in the **File** menu) now has an option to suppress ID Index updates.
- Cancelling the **Load Data** or **Merge Data** operations no longer cause a bomb.

1.0.6 3 August 1994

- Some internal changes to try and alleviate user-experienced bugs.
- Trivial cosmetic changes.

1.0.7 11 August 1994

- Changed to enable CR, LF or CR/LF at end of lines in update files. This should not affect most users, unless they're constructing their own update files.
- Removed the bug that causes Tradex to die or hang up when run the second time on a new computer without an ID# Index file having been created the first time. This is probably the cause of a lot of problems that first-time users have experienced. Unfortunately it only showed up when debugging was off, so I had problems tracking it down before. If Tradex didn't work on one of your Macs before, try it again - you might just be lucky!

1.0.8 12 August 1994

- Fixed the volume selector problem. You should now be able to select the volume for thumbnails, portfolio updates, etc. (if you have more than one volume mounted)
- The thumbnails problem where the entire stock was not being displayed, even though *All* was selected in Preferences has now been fixed.

1.0.9 27 August 1994

- A bug was fixed that prevented Tradex running on Macs without Color QuickDraw (caused an "unimplemented trap" error). Such older machines include Mac Plus, Mac SE, etc.

1.1.0 12 September 1994

- A bug was fixed that prevented the user from viewing and manipulating non-daily (e.g. weekly) data. The problem involved an incorrect calculation of dates, and might cause other (as yet un-noticed) problems to go away as well.

Note that you can't have version 1.0.10, so I had to increment the minor version number.

1.1.1 15 September 1994

- Bug fixed that caused last point of some thumbnail charts to be drawn off scale.
- Bug fixed that caused strange values to be displayed on thumbnail charts if the history file contained no data.
- Minor changes to improve the display of large numbers.
- Bug fixed that caused the maxima and minima to be incorrectly computed when a stock split was performed, causing some problems with displaying thumbnail charts.
- Note: You can check (and repair) bad maxima and minima by loading the “offending” history data and performing a **Check Data** function (**History** menu) and scrolling to the last window. This function has been changed to do the repairs automatically.

1.1.2 20 September 1994

- Voice output changed to the latest Text-To-Speech manager. The original MacInTalk (which was somewhat flakey) will no longer function and will be ignored, the new Speech Manager with MacinTalk 2 and/or MacinTalk Pro will. I realise that most of you either didn't know or didn't care about this feature (in the About Tradex window), but I had one user who sat and listened to the latest downloaded stock prices while he was eating breakfast!

- Fixed a problem that caused moving averages to be computed with all “unknown” data after an “unknown” data point in the original data.
- Fixed a problem that was causing inaccuracies in the Thumbnails window.
- A small amount of reorganisation in the Preferences dialog (**Preferences...** in the **File** menu) .
- A new Preferences item has been added to enable more accurate Thumbnails to be drawn. The **Accurate** check box will plot the thumbnails on a linear time scale and gaps will be left where no data is available. If the check box is left unchecked then the data points are compressed and the gaps are omitted (as before). Note however that the “accurate” method is more computationally intensive and the Thumbnails window takes longer to be drawn. Warning: the “accurate” method *might* be a bit flakey on weekly data.

1.1.3 4 October 1994

- What I didn't mention in the 1.1.2 changes, was that I had made a change so that instead of deleting the preferences if I made a small change to the format, Tradex would preserve the old preferences. Unfortunately (because I never had a chance to test properly) I didn't take into account the users that are either (a) new or (b) make a habit of trashing their preferences each time I post an update. This doesn't work any more, because of a bug! This version fixes that problem. For those of you experiencing problems (e.g. bombs when you try and compute a moving average, etc.), this version will make you smile again. For those who noticed nothing, upgrade anyway. Sorry for the inconvenience.

1.1.4 4 November 1994

- Load/Merge history data can now handle data with a decimal comma (e.g. 56,6) as well as a decimal point (e.g. 56.6).

1.1.5 19 November 1994

- **Happy Note:** Tradex has now been tried out on a PowerMac and appears to show no problems on that platform, although it's not PowerMac-native yet. It also appears to work under System 7.5, and is apparently significantly faster - especially on those annoying ID Index updates. Thanks to the users who reported these findings.
- A fair amount of "cosmetic" tidying of various dialog boxes has been done. This makes them somewhat less ugly, but doesn't change their functionality (except where noted in other Version 1.1.5 changes below). I am not currently planning to update the manual with screen shots of the new dialogs - it should be fairly obvious what has been done.
- An addition has been made to allow you to inspect the changes in close price on the thumbnail charts. The **Preferences** dialog has been rearranged and changed to allow this.
- The thumbnail **More** option in the Preferences dialog, if set, allows more thumbnails to be displayed on the screen. Without this option set, on a typical 640 by 480 screen, 5 rows by 3 columns will be displayed. If the option is set, 6 rows by 5 columns will be displayed (together with smaller font sizes and lower resolution, of course).
- All the functions in the **Oscillators** sub menu of the **Operations** menu now have a Scale factor field. This is a

simple multiplication factor on the final value to make the chart limits larger so that if your data has large values you don't get a

"flat" line at zero. Of course, you can still use the Scale operation, but this built-in factor removes the need for an extra step.

- The **Moving Average** dialog now has a smoothing factor selection (for exponential smoothing only) that allows the factor to be $2/(n-1)$ (the previously used value), $2/n$ (as used by Back Trak), $2/(n+1)$ (as used by Compu Trak), or a value chosen by the user (0.01 - very smooth, 0.9 - not very smooth). n is the number of specified time periods. The formula used in exponential smoothing/moving averages is (for what it's worth):

$$x = (c - xp)*k + xp$$

where x is the next smoothed value, xp is the previous smoothed value, c is the current data value (e.g. close price) and k is the smoothing factor.

- The **Moving Average Convergence-Divergence** (MACD) indicator can now be calculated (**Moving Average** submenu of the **Operations** menu).

1.1.6 **16 December 1994**

- Included the **Volume Accumulation** (Chaikin) oscillator in the **Volume Indicators** submenu of the **Operations** menu.
- The Sector field (history parameter) has been expanded from a 7 character maximum to a 17 character maximum. (This change involved a change in the format of History and Portfolio files, so when you next open one of these Tradex will want to "save changes" when it closes again. Your data should not be affected however)
- Thumbnails can now be sorted in (ascending) order by ID# (the previous default), Name, Sector, Last Close, Last High, Last Low, Last Volume or by Percentage Price Change.
- Fixed a bug that was confusing the ID Index whenever an *alias* of a history or portfolio file was found. This caused some upset, especially under System 7.5.
- Fixed a bug that caused upper- and lower-bound lines to be drawn on the incorrect thumbnail charts.

1.1.7 **4 January 1995**

- A bug that corrupts the high, low and volume data of some or all history files was fixed. This bug only occurs if you used thumbnails in Version 1.1.6 before you updated or used the existing history files. Only the Close data is loaded when a thumbnail is drawn, but because the history file format was changed, Tradex saves the info back to your file when thumbnails are closed - effectively wiping out the existing high, low and

volume entries. Sorry about that.

- A few trivial (but requested) improvements to thumbnails.

1.1.8 18 January 1995

- A problem with incorrect colours being used for charts, especially with monochrome monitors or PowerBooks, was found and (hopefully) eradicated. One of the symptoms of this problem (seen by several users) was that charts and other indicators (e.g. Fibonacci zones, etc.) were being plotted in the background colour, thus making them virtually invisible.
- If the colour depth of the screen is changed while Tradex is executing (via the Monitors control panel), it will be correctly handled.
- By popular demand, Cmd-W has been added to the File menu to close windows.

- By popular demand, the minimum and maximum fields in the Fixed Scale dialog have been reversed in order.
- To avoid confusion, I have disabled the Log Scale option in Preferences. This feature has not been implemented. When it is implemented, I will re-enable it.
- ...and now the feature you've all been waiting for: I have added the ability to specify the path/s to your data files, so that the ID Index update happens in a flash, and you no longer have to wait forever while your entire hard disk is searched for relevant files. Note, though, that this feature is for System 7.0 or greater, and will not function with System 6 or before. This feature is enabled via the new **Data Paths...** command in the **History** menu.

1.1.9 5 February 1995

- I'm currently updating the manual, but it's taking longer than I anticipated. Please be patient. A revised copy will be sent to all registered users, probably with the next version (1.2 - a nice "round" number), if not before. If you're not registered yet, then why not register now?
- A problem with the new Data Paths dialog causing unexpected crashes on some machines was fixed.
- The **Preferences** dialog now has a Data Entry option that specifies whether you prefer to have your data displayed/entered in eighths (e.g. 74 3/8) or decimal (e.g. 74.375).
- A charting problem from the Thumbnails window has been fixed. Previously, if you were looking at a Point & Figure chart selected by double-clicking a thumbnail with auto-box-size turned on, and then switched to another stock by double-clicking again, the same box sizes, etc., would be applied to the new chart, requiring the user to set the auto-box-size each time by using the menu item.
- I have done away with the Master Security Code, since it compromised whatever security you have on portfolios. An intruder need only trash the Preferences file to be able to his/her own Master Security Code. **Warning:** If you have put passwords/security codes on portfolios, you'll only be able to access them via those passwords from now on.
- ...and now the big one. Recoder is now redundant, since importing history and update files can be done directly from within Tradex. However, I suggest that you don't trash Recoder until you've ascertained that the new feature works on your import data files. If it doesn't, or you can't figure out how to set up Tradex to import your particular files, send me a copy of the offending file and I'll advise you how to set it up (or fix Tradex!). I hope to build up a collection of Import format files (see below) for the more common data formats, which I will distribute to registered users.

Note that this feature is for System 7.0 or greater, and will not function with System 6 or before. Unfortunately, I forgot to put in the test to stop System 6 users from using it, but it will appear in the next version.