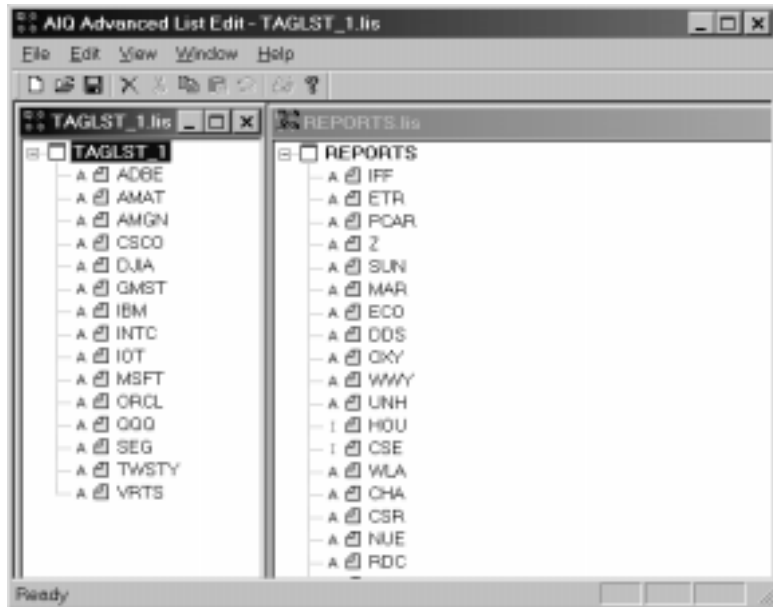


## Advanced List Edit

This utility is used to import/export lists and to perform various editing functions on AIQ list files.

- You can open multiple lists and drag/drop or cut/paste between the lists.
- You can import CSV list files from Excel.
- You can export list files to CSV format, which allows you open and work with them in Excel.



*Advanced List Edit window  
with two lists displayed*

↑ *To access Advanced List Edit:*

- Select **Advanced List Edit** from the List menu.
- or-
- Click the **Advanced List Edit** toolbar button.

The *Advanced List Edit* window appears. The large empty window is used for displaying one or more lists.

## Opening lists in Advanced List Edit

↑ *To open an existing AIQ list file:*

1. From the *File* menu, select **Open**.

-or-

Click the **Open** toolbar button.

2. The standard Windows *Open* dialog box will appear.
3. Go to your winTes32 folder and select the list file (.lis) that you want to open.
4. Click the **Open** command button.
5. The list will appear in the *Advanced List Edit* window. Lists are displayed in exactly the same format as in the List section of the main *Data Manager* window.

↑ *To open multiple lists:*

1. Open each list using the same procedure as above. You can only open one list at a time. As each list is opened, it is displayed in a separate panel within the *Advanced List Edit* window.
2. Use the **Tile** and **Cascade** commands on the *Window* sub-menu to arrange panels in the configuration you prefer. You can also move and resize individual list windows with your mouse using standard Windows procedures.

## Creating a list in Advanced List Edit

↑ *To create a new list:*

1. From the *File* menu select **New**.

-or-

Click the **New** toolbar button.

2. In the *List Name* dialog box, type a name for the new list
3. Click **OK** to open a new panel which contains the new list. At this point, the new list consists only of the list name.

## Moving, copying tickers from one list to another

↑ *To move a ticker from one list (source list) to second list (target list) using Drag and Drop with mouse:*

1. In source list, find ticker you want to move to target list.

2. Select ticker and, while holding down the left mouse button, move the mouse to the location in the target list where you want the ticker to appear.
3. When you release the button, the ticker will appear in target list and is removed from source list.

↑ *To move a ticker from one list (source list) to second list (target list) using Cut and Paste:*

1. In source list, find ticker you want to move to target list and select.
2. Choose **Cut** from *Edit* menu.
3. In target list, select list or ticker where you want ticker to be inserted.
4. Choose **Paste** from *Edit* menu. The ticker will appear in target list and is removed from source list.

↑ *To copy a ticker from one list (source list) to second list (target list):*

1. In source list, find ticker you want to copy to target list and select.
2. Choose **Copy** from the *Edit* menu.
3. In target list, select list or ticker where you want ticker to be inserted.
4. Choose **Paste** from the *Edit* menu. The ticker will appear in target list and remains in source list.

↑ *To remove a ticker from a list:*

1. Find and select ticker.
2. Select **Delete** from the *Edit* menu and click **Yes** to confirm the delete.

### **Importing/Exporting CSV list files**

A properly formatted CSV file can be imported by *Advanced List Edit*. Once in *Advance List Edit*, the file can be saved in the AIQ list file format.

The CSV (Comma delimited) file format is one of the formats in which an Excel worksheet may be saved. When an Excel worksheet is saved in the CSV file format, the text and values displayed in cells of the worksheet are saved. All rows and all characters in each cell are saved. Columns of data are separated by commas, and each row of data ends in a carriage return.

#### **Note**

The *Undo* button on the toolbar removes last edit (only one level).

## Note

The **Import** and **Export** commands found on the **List** submenu may also be used to import/export CSV list files to and from *Data Manager*.

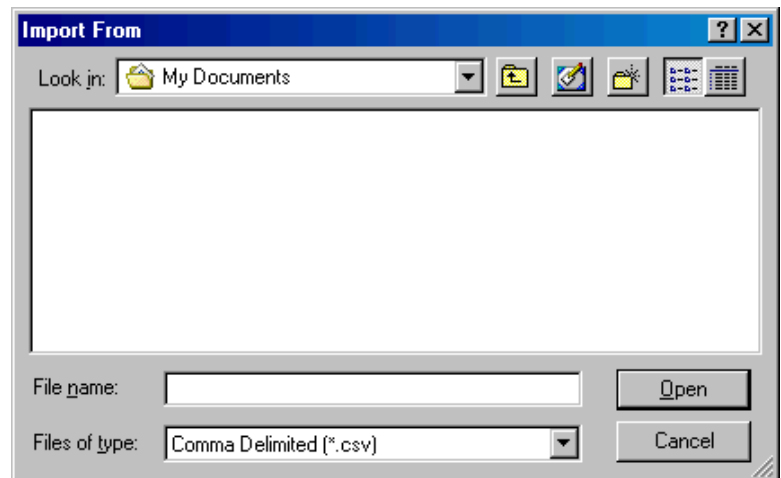
Most screening software will allow you to export the results of a screen in the form of a CSV formatted file. If necessary, you can then use Excel to make modifications to the file so that it can be read by Advanced List Edit.

The CSV format is suitable for multi-level structured lists as well as simple one level (flat) lists. Creating a multi-level list, such as a sector/group/stock structured list, will require some manipulation in Excel and is beyond the scope of this documentation.

## Importing CSV List Files

↑ *To import a CSV file:*

1. Open **Advanced List Edit** and click the **New** toolbar button.
2. In the *List Name* dialog box, type a name for the new list (this is the list file that will contain the imported list file). Click **OK**.
3. Choose **Import** from the *File* menu. (You need to have a file open before this option shows on the menu).



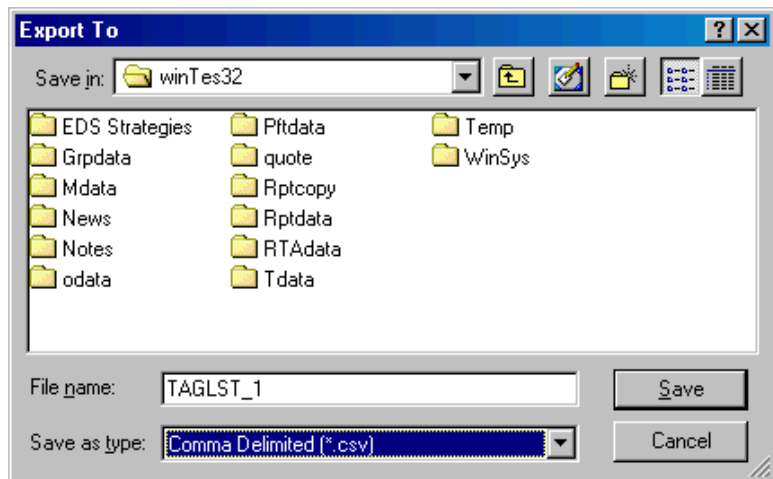
*Import From dialog box*

4. Use the *Import From* dialog box to locate the CSV file you want to import. When you have the file selected, click **Open**.
5. When the processing of the imported CSV file is complete, the imported list will appear in the *Advanced List Edit* window under the name of the list created in step 2.

## Exporting a list as a CSV file

↑ To export a CSV file:

1. Open **Advanced List Edit** and click the **Open** toolbar button. The standard Windows *Open* dialog box will appear.
2. Use the *Open* dialog box to find and select the AIQ list (.lis) file that you want to export.
3. Click the **Open** command button. The list will appear in the window.
4. Choose **Export** from the *File* menu. (You need to have a file open before this option shows on the menu).



*Export To dialog box*

5. Use the *Export To* dialog box to specify a location for the exported CSV file. The *Save as type* list box should display **Comma Delimited (\*.csv)**.
6. Click the **Save** command button to initiate the exporting process. When complete, the exported list file will be saved in the folder specified in step 5.