

Tina Logan's Organizing Your Trading



Creating Trading Directories

TINA LOGAN
Trader's Roadmap
Training and Coaching for Traders

PO Box 2046, La Jolla, CA 92038
Phone: (858) 232-3879
www.tinalogan.com

TERMS & CONDITIONS – WAIVER OF CLAIMS

By purchasing training products and/or follow-up training, or receiving complimentary educational products and services, from Tina Logan, Trader's Roadmap, or Tina Logan, Inc., you understand and acknowledge the following terms and conditions:

The content provided in these training courses is for your use only. Neither printed or downloaded versions, nor any follow-up instruction or materials, are to be copied, shared, sold, or distributed to any other individual or entity without written permission from Tina Logan. You acknowledge that you are not an agent of, or acting on behalf of, any seminar company or other company that provides competitive training or products.

All content in these training materials, and any related materials provided with them today or in the future, is for educational and illustrative purposes only and does not constitute either investment advice or buy/sell recommendations. The author, Tina Logan, is not a stockbroker, broker dealer, or investment advisor. She makes no recommendation either to purchase or sell any particular stock, bond, option, equity, or security of any kind. No content, examples, or information provided shall be construed as a recommendation, solicitation, prediction, or advice for your own actions in, or dealings with, the stock market.

Trading in the stock market involves a high degree of risk and you may incur financial losses if you engage in such activity. These training courses and commentary were designed and intended to assist recipients in increasing their knowledge of the stock market and applying the techniques and strategies learned. Users are advised to apply prudent risk and money management techniques in order to protect their capital.

Any or all strategies may be subject to change as needed with market conditions. The dynamic of the markets often requires that traders change their methods and systems over time. Therefore, what the author is utilizing currently may differ in the future as market conditions change and/or as the author tests new systems and learns new, more effective methods. Past performance is not indicative of future results.

These materials represent the author's knowledge and interpretation of the stock market and trading methods and techniques at the time they were developed or revised. Charting is partially a skill and partially an art, and some of the content of these materials is subjective in nature. There is no guarantee that these strategies, techniques, systems, or trading plans will suit your trading personality, but rather are intended to serve as a model.

It is your responsibility to review, practice, and put what you learn to work. Becoming a great trader requires commitment, focus, and discipline. Your mentors and tutors cannot be responsible for those things. It is up to you to do the work required.

Reference above to "products and services" includes, but is not limited to: private or group training or coaching; phone or online instruction; downloadable or printed eBooks; forms, code, and trading tools; and audio-video products. The above terms, conditions, and waiver of claims are provided and acknowledged at the time of registration for complimentary products, or the purchase of products and services, either in person or at the following web site: www.tinalogan.com.

CREATING TRADING DIRECTORIES Table of Contents

TOPIC	PAGE #
INTRODUCTION	4
CREATING TRADING DIRECTORIES	4-10
Organize Favorite Website URLs	4-7
Set up Main Directories	5-6
Set up Sub-Directories	6-7
Add URLs to Directories	8-9
Tina Logan's Favorites (Example Directories & Sub-Directories)	10
Most Recently Viewed Web Sites	10
ORGANIZING YOUR FILES	11
CREATING SHORTCUTS ON THE COMPUTER DESKTOP	12

CREATING TRADING DIRECTORIES

Getting and staying organized is part of a trader's routine. Think of organizational tasks as the *administrative* part of your work. Just like with any business, and rest assured that trading is a business, there are a certain number of administrative details that must be addressed. Although those tasks may not be nearly as fun as browsing through charts, if they are not given adequate attention the result may be plenty of frustration. One such task is that of organizing files. Whether setting up a list of Favorites in your web browser, or a trading library where you'll store information on the computer for quick and easy access, using directories is a great way to organize your work.

USING DIRECTORIES AND SUB-DIRECTORIES

If you are already adept at using directories and sub-directories to manage files, e-mail, and website favorites, the next few pages will be a refresher and you may learn a few new tips. If you have never used directories before, read carefully because this discussion will be enlightening. It does not take long to learn how to organize your work and it will save you time and frustration in the future.

Organize Favorite Websites

Undoubtedly, there will be several websites you'll visit frequently. Make accessing those sites quick and easy by adding them to the Favorites folder in your web browser (Figure 1.1).



Figure 1.1

If you only visit a few websites, it is fine to save the URLs in the main Favorites folder. (A company's URL is its website address on the Worldwide Web.) However, if you visit a lot of different websites for trading-related and other purposes, and place one URL after another in that folder, the list can become quite long. Consequently, it may get tiresome searching through the list for the website you are seeking.

Many Internet users are not aware that they can organize the URLs *within* the Favorites folder. Most web browsers provide a feature for doing so. Rather than just saving a URL to Favorites and adding it to that long list of websites, you can keep your resources well organized by setting up directories. For educational purposes only, Microsoft's Internet Explorer is used for instruction and illustration in this section. The steps for setting up directories should be similar in other web browsers.

There are two types of directories that are discussed in the following pages:

- Main Directories = Major categories
- Sub Directories = Categories within a main directory

Set up the Main Directories

Let's start by setting up one or more main directories. Since you'll be visiting a lot of trading-related websites, it makes sense to have a main directory to hold those URLs. In addition to trading, let's say that you also like to play golf. You may visit the sites of several golf courses, online golf apparel stores, and so on. In addition, you may be a wine aficionado. Since you'll be visiting sites for all of those activities, you can set up a main directory for each one so you can quickly access their respective groups of URLs. You'll need to set up three main directories with the following titles:

- Trading
- Golf
- Wine

Note: These are just examples for instructional purposes. You should set up the directories that reflect your interests.

Following are the steps to create a main directory:

1. Open Internet Explorer.
2. Click Favorites on the main menu.
3. Select Organize Favorites... (Figure 1.2)
4. Click the Create Folder button (see Figure 1.3). A file folder icon with the words New Folder will appear in the window. Note that the words New Folder are highlighted—that means you can type over them. Type the word TRADING and press enter. I use all caps for main directories.

If you misspell the folder name, or wish to name it something different, just click on that folder's name, click the Rename button, and type over it.

5. Repeat the steps above to create the additional main categories (e.g., GOLF and WINE).
6. Click the Close button.

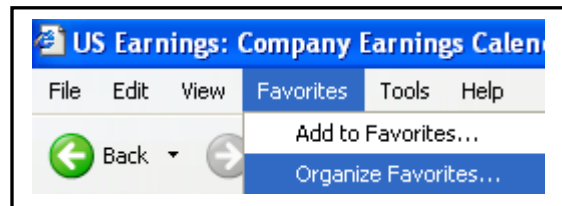


Figure 1.2

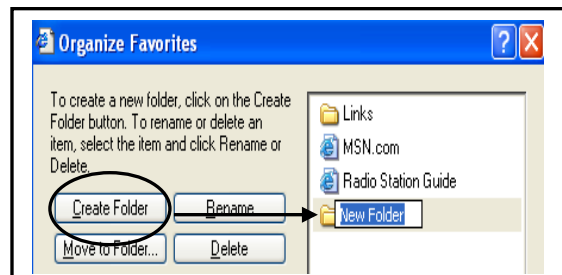


Figure 1.3

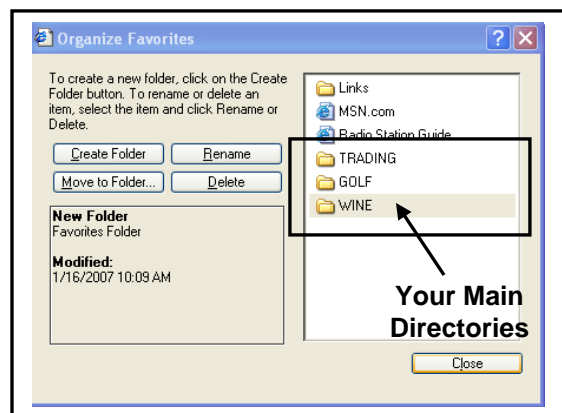


Figure 1.4

Click Favorites on the main menu of the browser again and you'll see that the file folders you just created are now listed in the menu (see Figure 1.4). You are now ready to create some sub-directories within those main categories.

Set up the Sub-Directories

You can add your favorite trading-related websites into the main directory of TRADING. However, don't be surprised if you eventually accumulate several URLs for one particular sub-category of trading. For instance, let's say there are three websites you like to access to check for the dates of upcoming earnings releases for stocks. If you have two or more URLs for a specific sub-category of trading, consider creating a sub-directory to hold those URLs. Let's create the following three sub-directories under TRADING:

- News
- Earnings
- Exchanges

Following are the steps to create a sub-directory:

1. Open Internet Explorer.
2. Click Favorites on the main menu.
3. Select Organize Favorites...
4. Click the Create Folder button (Figure 1.5). Type over the words New Folder with the title Earnings. I type the sub-directories in lower case letters.
5. Press enter.
6. Click the Earnings folder you just created.
7. Click the Move to Folder... button (see Figure 1.6).
8. Click the TRADING folder to select it (Figure 1.7).
9. Click the OK button.
10. Click Close.

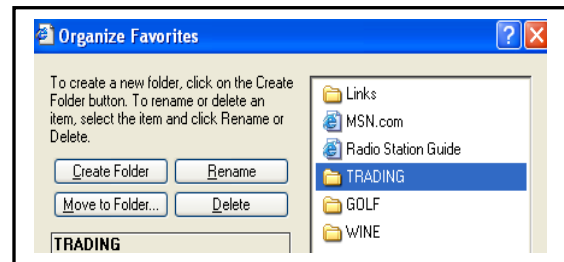


Figure 1.5

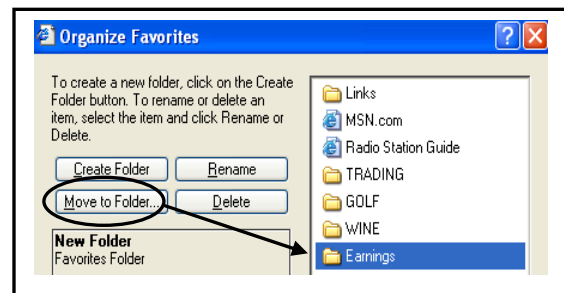


Figure 1.6

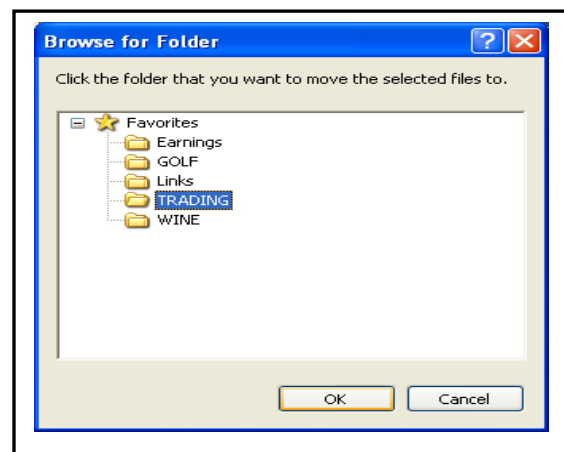


Figure 1.7

Click Favorites on the main menu of the browser again. Point the mouse at the TRADING folder. To the right you'll see the sub-directory Earnings. To the right of Earnings you'll see the word Empty (Figure 1.8). Once URLs are added to this sub-directory, the folder will no longer be empty.

Following the steps on page six, create additional sub-directories (e.g., News, Exchanges, etc.). Create sub-directories for your other interests if desired (e.g., GOLF: Favorite Courses, Tournaments, etc.).

Now that the main and sub-directories have been created (Figure 1.9), you are ready to start adding URLs to the folders. As you progress with your trading activities, continue to add more sub-directories as needed.

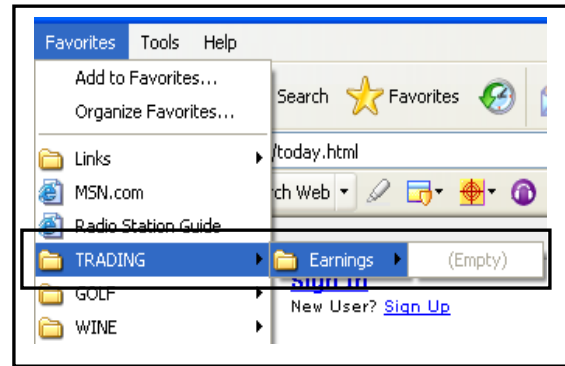


Figure 1.8



Figure 1.9

“I do not think there is any other quality so essential to success of any kind as the quality of perseverance. It overcomes almost everything, even nature.”

~ John D. Rockefeller

Add Favorite URLs to Directories

When you visit a website, the site's URL will show up in the Address field near the top of the browser screen. Following are the steps for adding a URL to a directory or sub-directory:

1. The URL to be added should appear in the address field (Figure 1.10).
2. Click Favorites on the main menu.
3. Select Add to Favorites... (Figure 1.11). In the Add Favorites dialog box you'll see the main directories you created earlier (Figure 1.12).

If you have created sub-directories within those main directories, a plus (+) sign will appear to the left of the main directory's title. Click the plus sign to open the main directory and reveal the sub-directories (or just double click on the main directory). Once revealed, the plus sign will change to a minus (-) sign. To hide the sub-directories, click the minus sign (or double click the directory name again).

4. Click the main or sub-directory in which you'd like the URL to be saved.

The URL shown in this example is the Yahoo earnings calendar. This URL will be saved under TRADING-Earnings. Click the plus sign next to TRADING and click the Earnings sub-directory to highlight it (Figure 1.13).

5. Click OK.

Click Favorites on the main menu of the browser. Point the mouse at the TRADING folder. To the right you'll see the sub-directory Earnings. To the right of Earnings you'll see the URL you just added for the Yahoo earnings calendar (Figure 1.14).

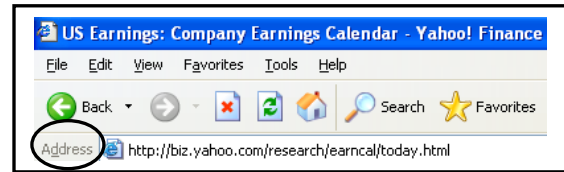


Figure 1.10

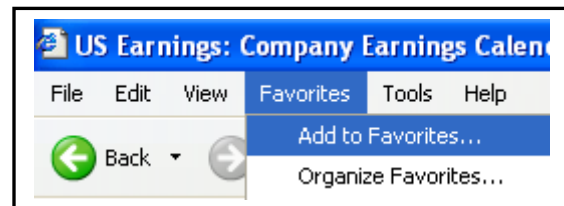


Figure 1.11

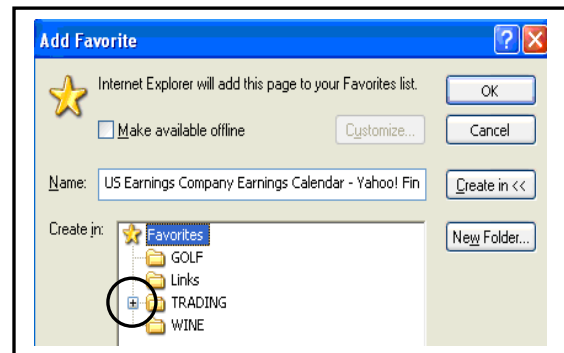


Figure 1.12

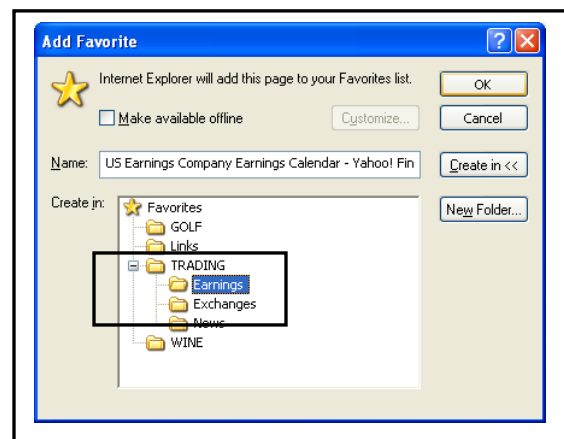


Figure 1.13

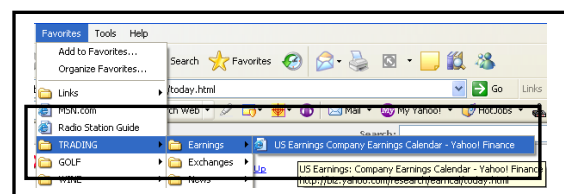


Figure 1.14

Now go visit each website you access frequently and add its URL to your Favorites under the applicable directory or sub-directory. Create additional sub-directories as needed. As you discover new websites for your trading and other interests, add them to your Favorites. There are several trading-related websites mentioned throughout my training courses that you may elect to add.

Trader Tip: Make sure to add Investopedia (www.investopedia.com) to your Favorites in the Learning & Resources sub-directory. Investopedia is a good resource, especially for beginning and intermediate-level traders. The site provides definitions and brief discussion about a myriad of trading and investing-related topics. For instance, if you want the definition of Beta, just type Beta in the Search box to access a menu of terms that include the word Beta. Click on the link to view the definition and information (see Figure 1.15).

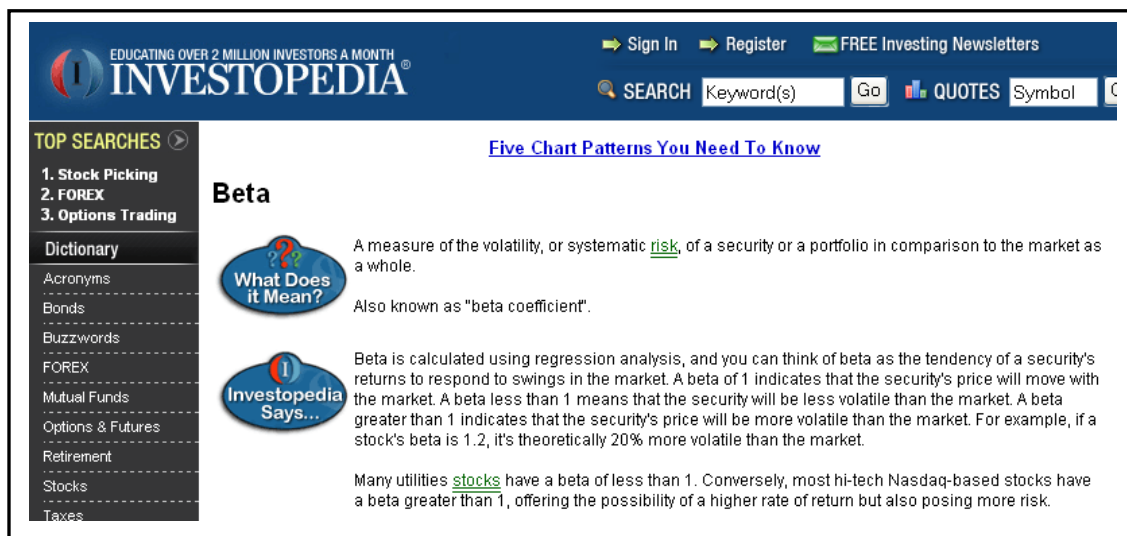


Figure 1.15
www.investopedia.com

Don't let the number of steps for creating directories deter you. In order to provide clear instruction for those who have never used directories before, each step must be described in detail and illustrated. However, once you've created a couple of directories, and saved a few URLs to your Favorites, it will become a very quick process. It won't take you long to create directories, and then all you have to do is maintain them and add to them.

Quickly Access Favorites

Once your directories are set up, accessing your favorite websites is quick and easy. Just click Favorites on the browser's main menu, pull down the mouse to the desired directory or sub-directory, and select the desired URL.

Tina Logan's Favorites Directories and Sub-Directories

As an active trader and a trainer, I've accumulated quite a list of Favorites over the years through research and trading activities. My trading sub-directories are shown in Figure 1.16 to provide some category ideas. Depending on your level of activity, you may have a small or very extensive list of directories and sub-directories.

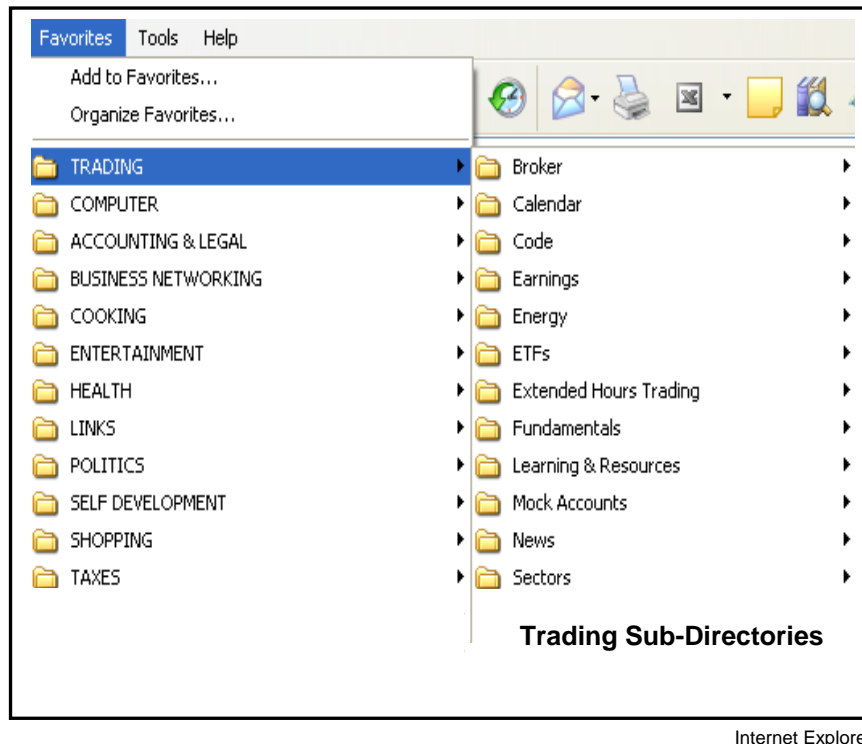


Figure 1.16
Tina Logan's Favorites – Example of Main and Sub-Directories

Most Recently Viewed Websites

Internet Explorer maintains a list of the websites recently browsed. Click the down arrow to the right of the address (URL) field. The last several sites visited will be listed (see Figure 1.17).

To quickly return to one of those websites, just click the URL in the list.

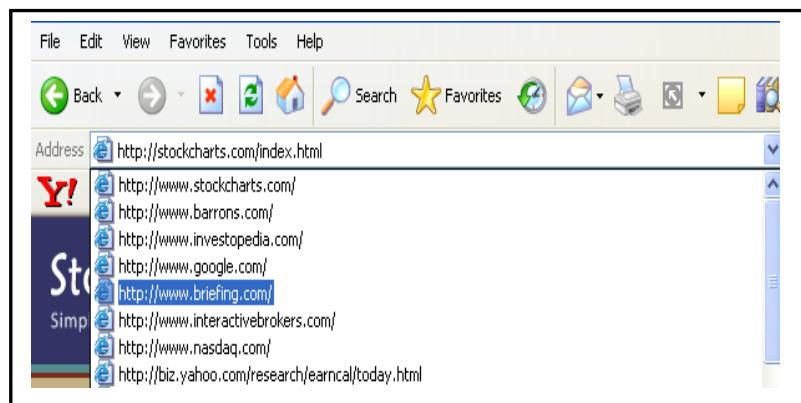


Figure 1.17
Recently Viewed Websites

ORGANIZING E-MAIL AND OTHER FILES

Once you understand the concept and the value of creating directories and sub-directories, you'll find other uses for this practice. Organizing your work in this manner saves a lot of time and frustration; both of which we need to control in order to make our trading activities, and our lives for that matter, run smoother.

Are there dozens of old messages stored in your e-mail Inbox? If there are e-mails you feel the need to keep, you can create directories to archive them. That way they can be quickly accessed when needed, but the Inbox is free from all the clutter. Most e-mail platforms—for example, Outlook, Google Mail, and Yahoo Mail—have directory creation tools for organizing messages. First, create your main e-mail directories (e.g., TRADING). Next create sub-directories under those (e.g., Trading Newsletters, Trading Buddies, and so on). Once the directories have been created, just drag and drop messages from the Inbox, or the Sent Items folder, into the appropriate directory or sub-directory folder.

Do you also find that you have to sift through long lists in the My Documents section of your hard drive to find certain spreadsheets or text documents? The Windows operating system comes equipped with a directory creation tool for managing the files on the hard drive. It is called *Windows Explorer* (not to be confused with *Internet Explorer*). This handy feature, which is basically the computer's filing cabinet, allows users to organize their documents, spreadsheets, photos, et cetera for quick and easy access. I use Windows Explorer to organize my computerized trading library, and all of my other business and personal files. If there is not already a shortcut on your desktop for Windows Explorer, I suggest creating one. Detailed instruction is provided on the following page.

The steps for creating directories and sub-directories are very similar from one application to the next. Therefore, the steps for creating them in your Favorites for websites, for managing e-mail, and also documents on the hard drive, are very similar. As you learn various programs that have the windows-based format, you'll begin to notice that there are many features and tools that are utilized in the same way, or in a very similar way, from one program to the next. That is the case with directory creation tools.

Another example of a standard, windows-based technique is the copy-paste feature. In most programs (e.g., Word, Excel, and TC2000 PCFs), if you highlight information and press Ctrl + C on the keyboard it will copy that information. Press Ctrl + V to paste the copied information in another location. If you don't remember the Ctrl + C or V feature, try highlighting and then right clicking and select Copy or Paste. There are many such generic processes, which makes it much easier to learn and navigate new programs.

CREATING SHORTCUTS ON THE COMPUTER DESKTOP

When you turn on your computer, after it goes through its initial startup processes you'll see the computer's desktop. The desktop is the backdrop displayed on the monitor. There are probably several icons on your computer desktop. Those icons are referred to as **shortcuts**. Double clicking a shortcut icon opens the program or file linked to it.

When a program is downloaded from a company's website (e.g., TC2000, Norton), a shortcut for that program is automatically created on the desktop. In addition, you can create your own shortcuts for files or folders.

Your trading routine can be made more efficient by creating shortcuts for some of the forms, spreadsheets, and text documents you use frequently. A shortcut can be created for an entire folder (e.g., Trading Forms), or for a text file or spreadsheet that resides in a folder (e.g., Trading Log). That saves you the time of having to locate the item in the My Documents folder every time you need to open it.

Following are the steps for creating a shortcut on the desktop:

1. Click Start.
2. Select My Computer.
3. Double click on a drive (e.g., C:) or a folder (e.g., My Documents).
4. Locate the folder or file for which you would like to create a shortcut (e.g., Trading Forms).
5. Right click that item and select Send to-Desktop. The shortcut icon will appear on your computer's desktop.

Once a shortcut has been created, it can be moved to a different location on the desktop if desired. Use the standard click, drag, and drop technique to do so.

Note: Shortcuts can also be created in Windows Explorer, or from the All Programs menu through the Start button.

***“The highest reward for a person's toil is not what they get for it,
but what they become by it.”***

~ John Ruskin

Dear Valued Customer:

I truly hope you have found this lesson to be helpful in developing your trading and organizational skills. Feedback from customers is valued and helps me to improve the products and services I offer. If you have any questions or comments regarding this lesson, please e-mail me directly at: tina@tinalogan.com.

If you found this lesson to be valuable, you won't want to miss out on the additional training I offer. I provide in-depth instruction on technical analysis, organizational techniques, trade management methods, specific trading strategies, stock selection, and advanced techniques. That training is available on the [Training & Products page](#) on my website via eBooks, with more products to be released in the future. I have your e-mail address on file, so you will be notified as new products and services become available. I also periodically add free content to the Free Stuff page on the website. Additionally, you may find some helpful tips and tools on the FAQs page.



I wish you the best of luck with your trading and am pleased to help you achieve your trading and investment goals.

Sincerely,

Tina Logan
www.tinalogan.com