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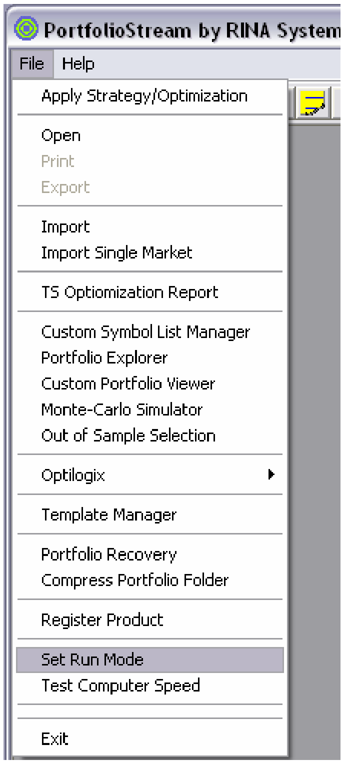
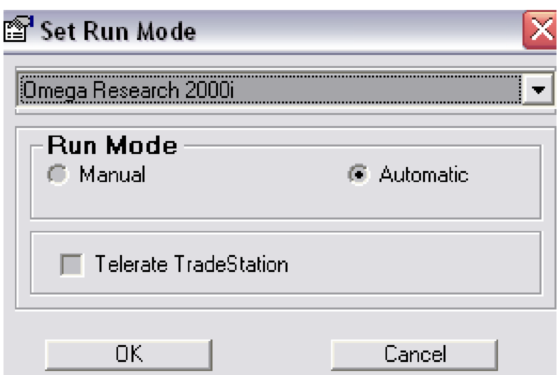
How To: Use Omega Research 2000i with RINA Systems software

First, we need to check that PortfolioStream is recognizing 2000i data.

1) On the menu bar, go to **File → Set Run Mode.**

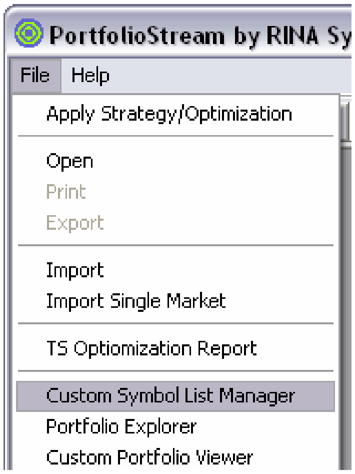


2) Ensure that you are set to Omega Research 2000i, click **OK**.



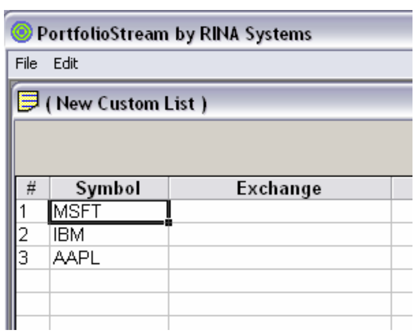
Next, we'll need to create a **Custom Symbol List**.

3) Go to **File → Custom Symbol List Manager**

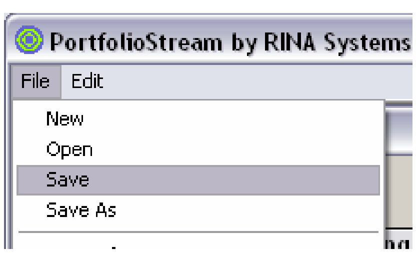


4) Go to **File→ New**

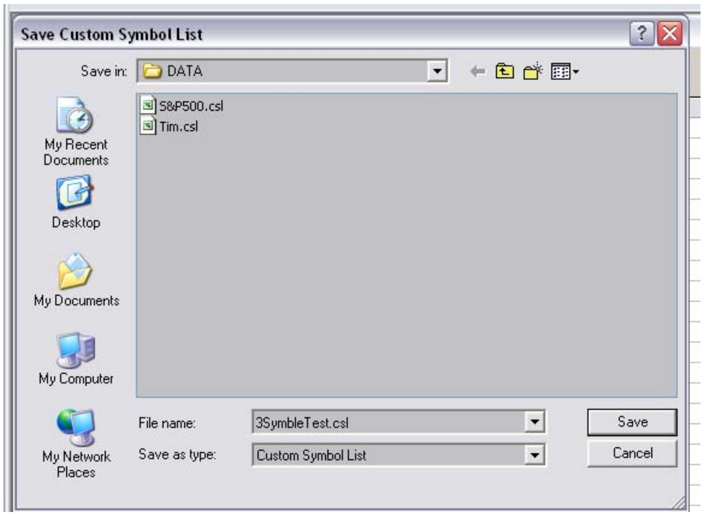
5) Type in your desired Symbols. Do not add extra spaces or characters, and remember to turn off CAPS LOCK when you are done.



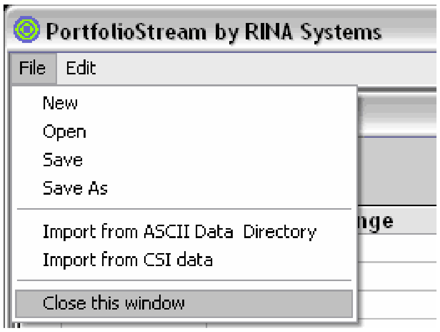
6) Go to **File → Save**.



7) Give a **name** to your file in the File Name box. Make sure you leave the .CSL extension in the filename. Then click **Save**.

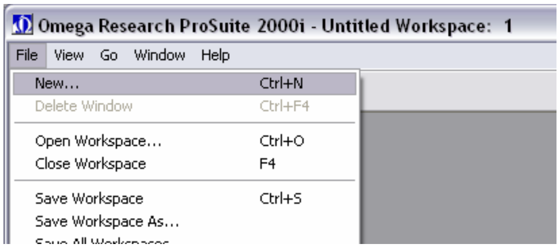


8) The Custom Symbol List is now created. Go to **File → Close** this window.

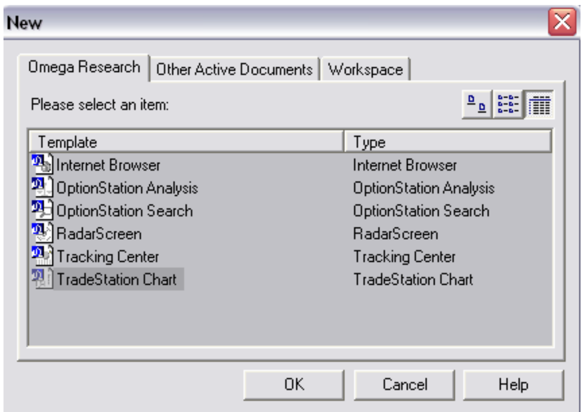


Now, we are ready to run a report.

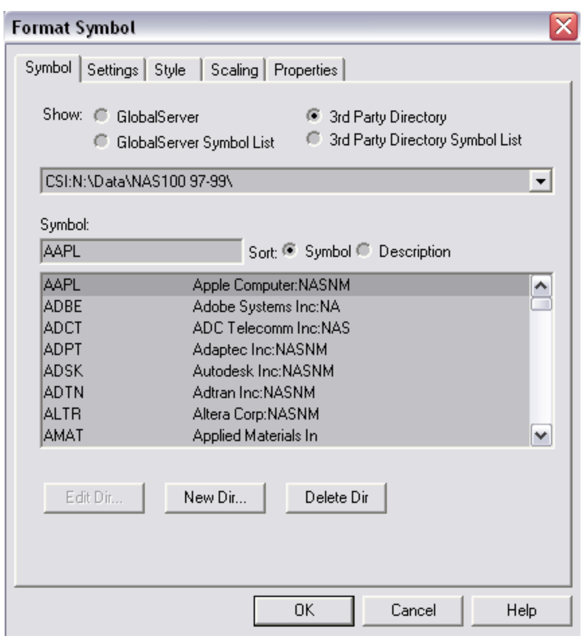
9) Open 2000i and go to **File → New**.



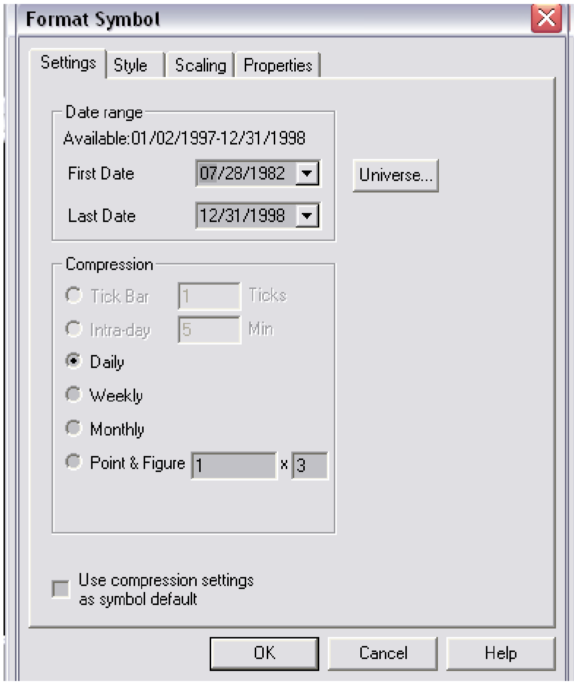
10) Select **TradeStation Chart** and Click **OK**.



11) Under **Format Symbol**, select your data feed. Click **OK**.

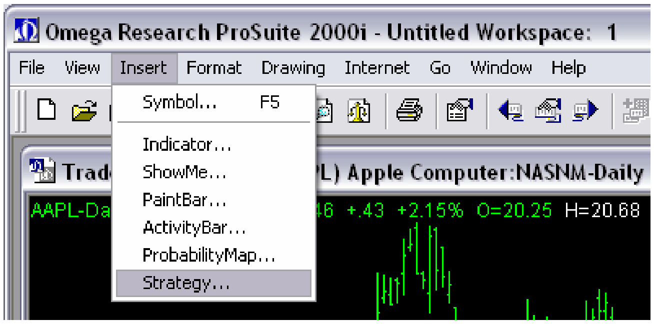


12) **Select your parameters**.
Set your Date range and preferred Compression settings for this symbol. Click **OK** when the symbol is formatted.



Repeat step 9 → 12 to open additional charts as needed. When all symbols are set, then you are ready to Insert your strategy.

13) Go to **Insert → Strategy**



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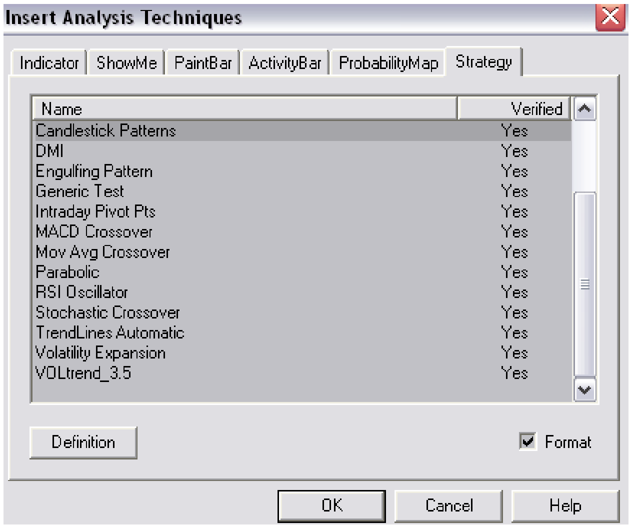
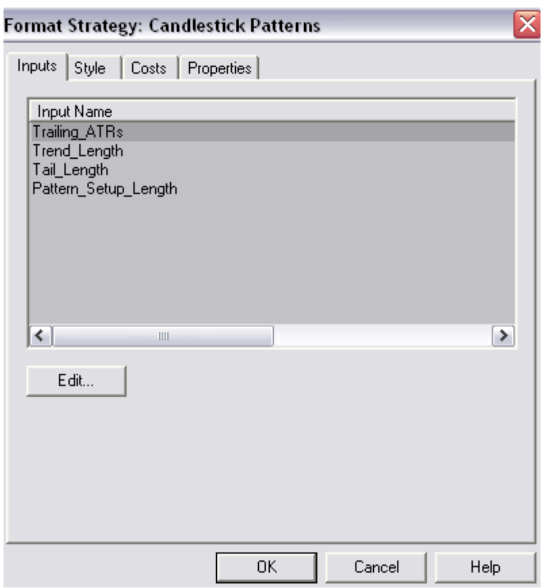
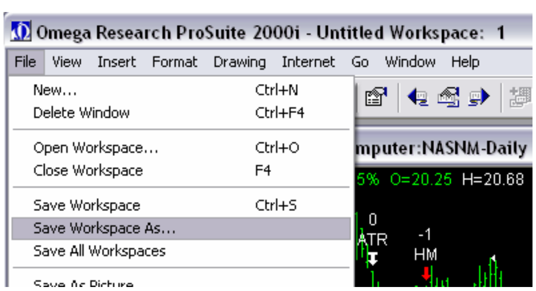
14) Select your desired Strategy. Then click **OK.**



15) Format your strategy. Edit the Inputs, Style, Costs and any additional Properties that you want to change. The Inputs tab should be the last one visible before you click **OK**.



16) To save your work, go to **File → Save Workspace As**.



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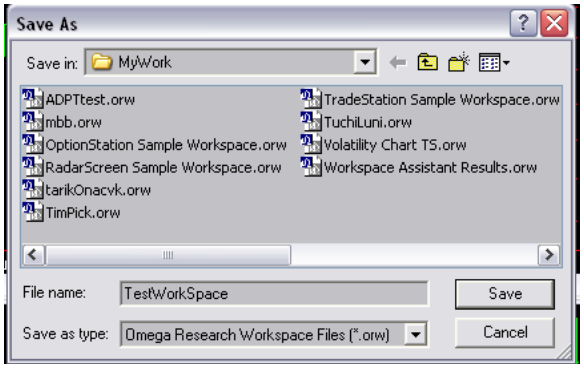
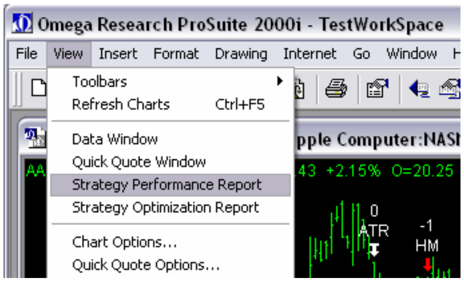
17) Give your workspace a name and click **Save**.

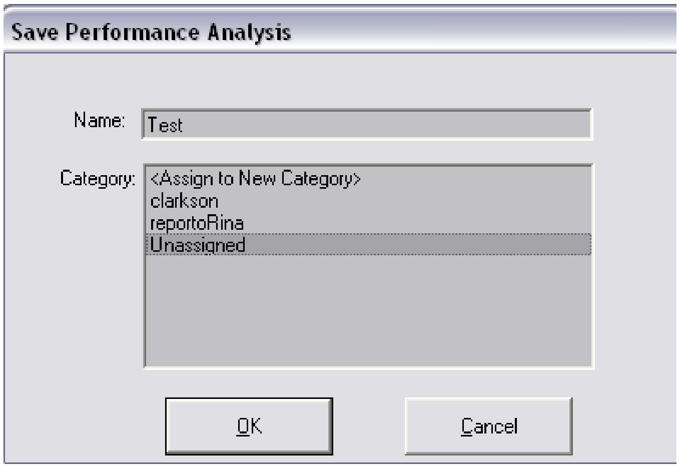


18) Go to **View → Strategy Performance Report**.

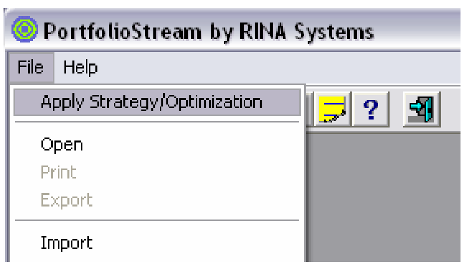


19) Click the **blue bullseye button** in the menu bar.

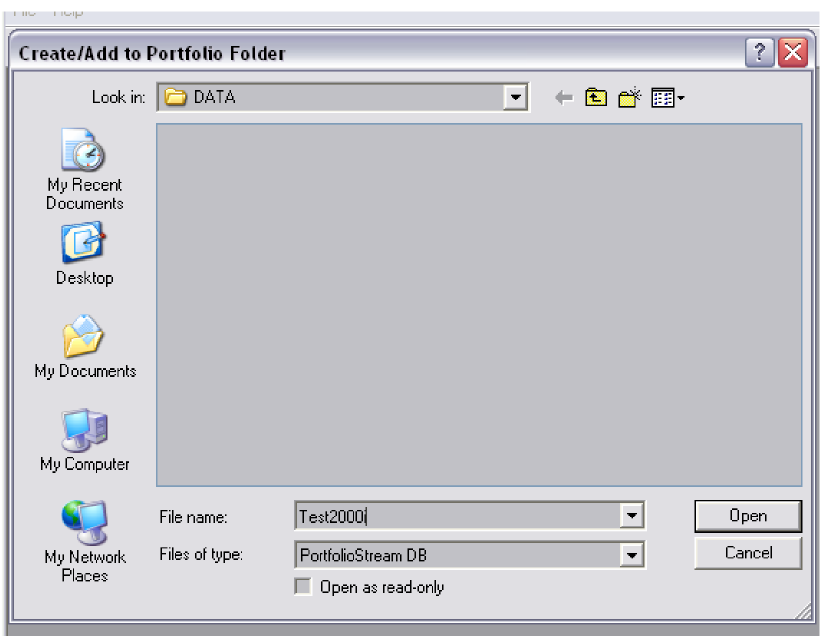
20) Assign a category or create a new category. Choose one selected in the Category box, or select “Unassigned”, and type in a Name at the top. Then click **OK**.



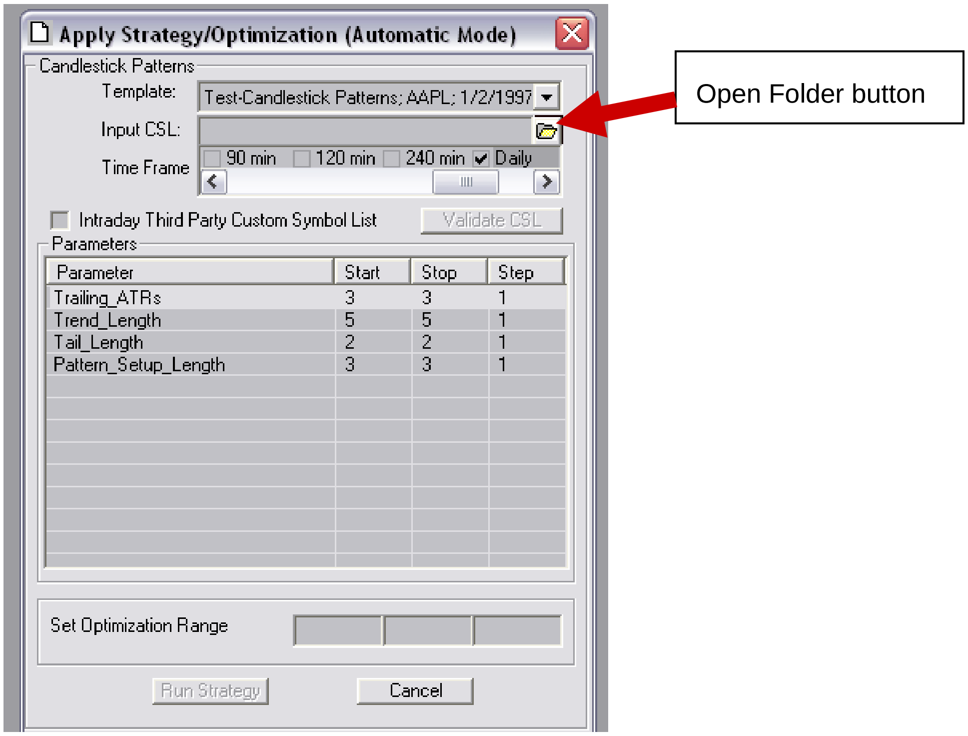
21) Go back to PortfolioStream. Go **to File→Apply Strategy/Optimization**.



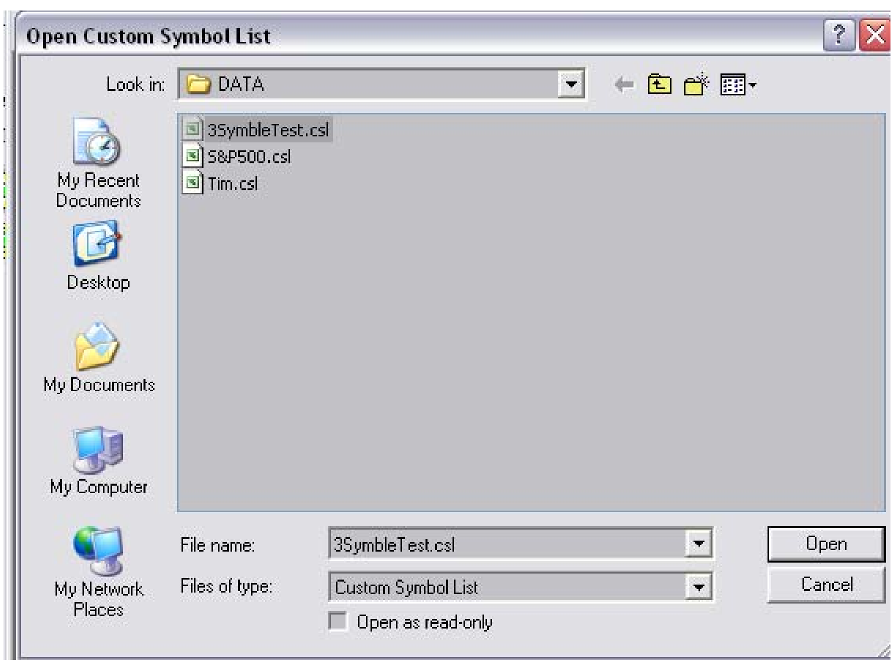
22) Create a name Click **Open**.



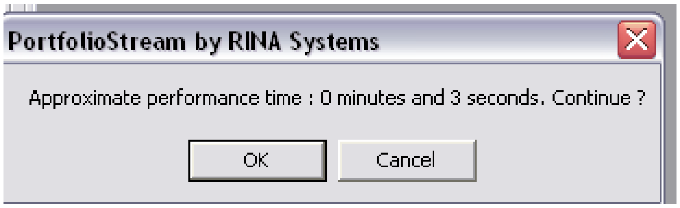
23) Select your template.



24) Press the **Open Folder** button next to Input CSL (shown in the previous example) to populate the below pop-up screen. Select the desired CSL file.



25) Click **Run Strategy**. The next screen will show an approximate amount of time it will take to run the strategy. Click **OK**. At this time, do not disturb the keyboard or the mouse while the software prepares your file.



26) When the portfolio is complete, a confirmation screen will appear. Click **OK**. Your portfolio is done!