

Release Notes

FutureSource 4.3.1

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1 Preface

This document outlines the key new features, functionality and content included in FutureSource 4.3.

All screenshots are examples for illustration purposes only. The exact layout and display may vary depending on Individual workspace customization.

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Release Notes Style Convention

- **Bold blue phrases** with pipe signs (|) denote a **menu** command, either from the main FutureSource drop-down navigation menu or through a contextual right-click menu in a certain window.
- **Bold black words** are used for emphasis in the text.
- Terms in quotation marks refer to a specific feature of the system.

2 Top New Content & Functionality

Some of the top enhancements of the new version include the following.

Functionality

Desktop Shortcut – Streamlined method for launching Java Applications

With changes in how Web Browsers will support the Java Plugin, we have updated our application to no longer be required to run inside a Web Browser. There is now a Desktop Shortcut available to streamline the FutureSource login process.

Flat Skin – Optional skin design

There are now two modes that you can run FutureSource in. Our Classic mode that has been available, as well as new Flat Mode that offers an updated different look and feel design.

OptionSource – Multi-Month Portfolios

Additional workflow is now available to streamline the creation of multiple month portfolios.

Charting – Multiple Improvements

Additional technical studies and toolbar options are now available within the chart window.

Function Library

Additional calculation methods available with Annual, Quarterly & Seasonal Functions.

3 Details of New & Enhanced Functionality

3.1 Desktop Shortcut – Streamlining FutureSource Start-up

With changes in how Web Browsers will support the Java Plugin, we have updated our application to no longer be required to run inside a Web Browser. There is now a Desktop Shortcut available to streamline the FutureSource login process.

Users can download the desktop shortcut from the login page..

3.2 Flat Skin – Optional skin with new flat design

An optional skin is now available that offer a new and fresh look to the FutureSource container.

Users can turn on the new skin from the View Menu and select User Interface.

3.3 OptionSource

3.3.1 Multi Month Selection

You can now easily create multiple month portfolios within OptionSource. Users can select multiple option expirations, and also lock an option month so that toolbar analysis does not change that month's configuration.

You can select multiple months and lock months using the delivery/expiration toolbar dropdown.

3.4 Charts

New areas of functionality have been added to the Chart window, they include:

- New Technical Studies
- Toolbar Options
- Candlestick Header Color
- Symbol Reference
- New Aggregation Type

3.4.1 New Technical Studies

There are 2 additional chart studies available

- Volume Weighted Moving Average
- Linear Regression Channels

3.4.2 Toolbar Options

There are now additional controls on the chart toolbar

- Plot Style
- Drawing Tools

- Remove All Analytics

3.4.3 Candlestick Header Color

You can now change the chart headers for Candlesticks to match price scale color. This option is now available in the Display Properties, under Text & Colors.

3.4.4 Symbol Reference

You can now use symbol reference within your Charts to create dynamic overlays. This will allow you to create plots and studies that are more dynamically linked to other symbols.

Visit the FutureSource Help Files for additional information on syntax and workflow.

3.4.5 New Aggregation . Current Year

There is now an additional aggregation mode available, Current Year. Users can choose Daily, Weekly or Monthly.

3.5 Data Table

New areas of functionality have been added to the Data Table, they include:

- Open Interest now available
- Advanced Copy to Clipboard Options

3.5.1 Open Interest

Open Interest is now a default within the Data Table.

3.5.2 Advanced Copy to Clipboard

User can now customize information that is copied to clipboard from the data table. Available options include:

- Number of Records
- Date Range
- Output Decimal
- Four Digit Years
- Last Record First

3.6 Futures Options

New areas of functionality have been added to the Futures Options Window, they include:

- Option Month Header
- Ability to switch between calls, puts or both

3.6.1 Option Month Header

You can now see the Delivery, Expiration and DTE for the Options present.

Strike	Aug 15 Exp: 07/16/15 DTE: 15		Sep 15 Exp: 08/17/15 DTE: 47		Oct 15 Exp: 09/17/15 DTE: 78		Nov 15 Exp: 10/15/15 DTE: 106	
	Market	Chg	Market	Chg	Market	Chg	Market	Chg
51.5	5.73		0.21		6.75		0.81	
52.0	5.27		0.24	+0.07	6.34		0.90	
52.5	4.81		0.30		5.94		1.00	
53.0	4.38		0.39		5.55		1.06	-0.10
53.5	3.95		0.44		5.17		1.23	
54.0	3.54		0.48		4.80		1.36	
54.5	3.14		0.63		4.44		1.51	
55.0	2.76		0.72	-0.07	4.10		1.70	
55.5	2.40		0.89		3.77		1.83	
56.0	2.06		1.08		3.46		2.02	
56.5	1.71		1.25		3.15		2.21	
57.0	1.43	0.00	1.47		2.86		2.42	
57.5	1.15	-0.01	1.71		2.60		2.66	
58.0	1.00	+0.02	1.95	-0.06	2.34		2.91	
58.5	0.77		2.26		2.11		3.17	
59.0	0.60	-0.04	2.60		1.88	-0.09	3.45	
59.5	0.45		2.96		1.68		3.74	
60.0	0.41	+0.02	3.36		1.43		4.06	
60.5	0.32		3.76		1.36		4.39	
61.0	0.22	+0.04	4.20		1.17		4.73	
61.5	0.14		4.64		1.03		5.09	
62.0	0.13	-0.01	5.11		0.94		5.46	
62.5	0.10		5.58		0.80		5.86	
63.0	0.08		6.06		0.69		6.26	
63.5	0.07		6.54		0.61		6.67	
64.0	0.10		7.03		0.54		7.10	
64.5	0.11		7.52		0.47		7.53	
65.0							0.84	8.76

3.6.2 Calls, Puts or Both

You can choose to display Calls, Puts or Both when using Multi-Month Mode. This is available from the Calls/Puts option on the Context Menu.

3.7 Function Library Enhancements

We have enhanced many of our built in functions to support 4 different calculation methods. These calculations methods can be applied to our Summer, Winter, Annual, Semi-Annual and Quarterly Functions.

Calculation Methods:

- AN (Active Now Contracts) . This will include contracts that are currently active and not expired. This is currently how our functions calculated prior to version 4.3.1
- AA (All Active Contracts) . This will include a %Full Function+worth of contracts. It will auto roll to the next point in time where all contracts required for the calculation are non-expired.
- AT (Active at Time) . This will include contracts that were active at that time (in the past).
- AL (Active or Last) . This will calculate using either the active contracts last price or if the contract has expired than it will use its last price everyday going forward.

Visit the FutureSource Help Files for additional information on syntax and for a complete list of Functions available.

3.8 Trading

New areas of functionality have been added to the FutureSource trader components, they include:

- LIFO, FICO Calculation Options

3.8.1 LIFO, FIFO Calculation Options

You can now choose between LIFO and FIFO for calculations to option positions.

4 Fixes

The Following fixes and performance enhancements are included in FutureSource Web 4.3.1:

- **Alerts**
 - 27574 . Conditions with Expressions
 - 31220 . Fit table not saving
 - 18520 . News alerts log
- **Account Manager**
 - 37430 . Improved message filtering
 - 29278 . Wrap tooltip to multiple lines
- **Chart**
 - 36922 . Real-time, Intraday Volume
 - 38068 . Ray drawing tool price display
 - 36053 . HIV study calculation when front option is serial option
 - 38106 . Forward Curve data view window display
 - 37441 . Print label matches tab name
 - 33227 . HIV study displayed as percent
 - 26745 . AMA study calculation
 - 29337 . Continuation back adjust
 - 20962 . Autoscale not persisting
- **External Data (XD)**
 - 38136 . Handling negative numbers
- **Futures Options**
 - 36920 . Font size change effects header
 - 37230 . Theoretical heading
 - 36836 . Fixed printing issues
 - 20333 . Filter reset issues
 - 17938 . Option chains are slow to download
- **Grid**
 - 37960 . COND function issues when 3rd parameter is expression
- **Framework**
 - 35830 . CRC error on workspace save

- 38166 . Expression shortcuts capitalization issues
- 29840 . Special trades handling in Charts
- **OptionSource**
 - 37711 . \$ fields displayed in 2 digit decimal
 - 36367 . ImpVol displayed in percent in analyze mode
 - 36918 . Column sorting issue
 - 37119 . Fixed input value for Bonds
 - 38195 . PrevIV Calculation
 - 37192 . Issue with serial months and show all strikes
- **Trading**
 - 38379 . Fixed an issue when fields would be disabled for an invalid symbol
 - 29854 . Position ornaments visible in printed copy
- **Watchlist**
 - 32473 . Issue with Futures auto listing
 - 37430 - Improved filtering speed in messages tab
 - 37830 . Description issue with Show Month Name

5 System Requirements

5.1 Operating System & Browser

- Windows Vista , W7 or Windows 8
- Internet Explorer 6 or higher, Mozilla Firefox 3 or higher, Apple Safari for Windows 3.2 or higher, Google Chrome

5.2 Java

- Minimum: Java Version 1.5
- Recommended: Java Version 1.6.10 or **Greater**
 - NOTE: Issue with Java Versions 1.6.24 to 1.6.25 have been detected on some isolated client systems.

5.3 Other Requirements

- Cookies Enabled
- Pop-Up Blocker Disabled for Login.FutureSource.com URL