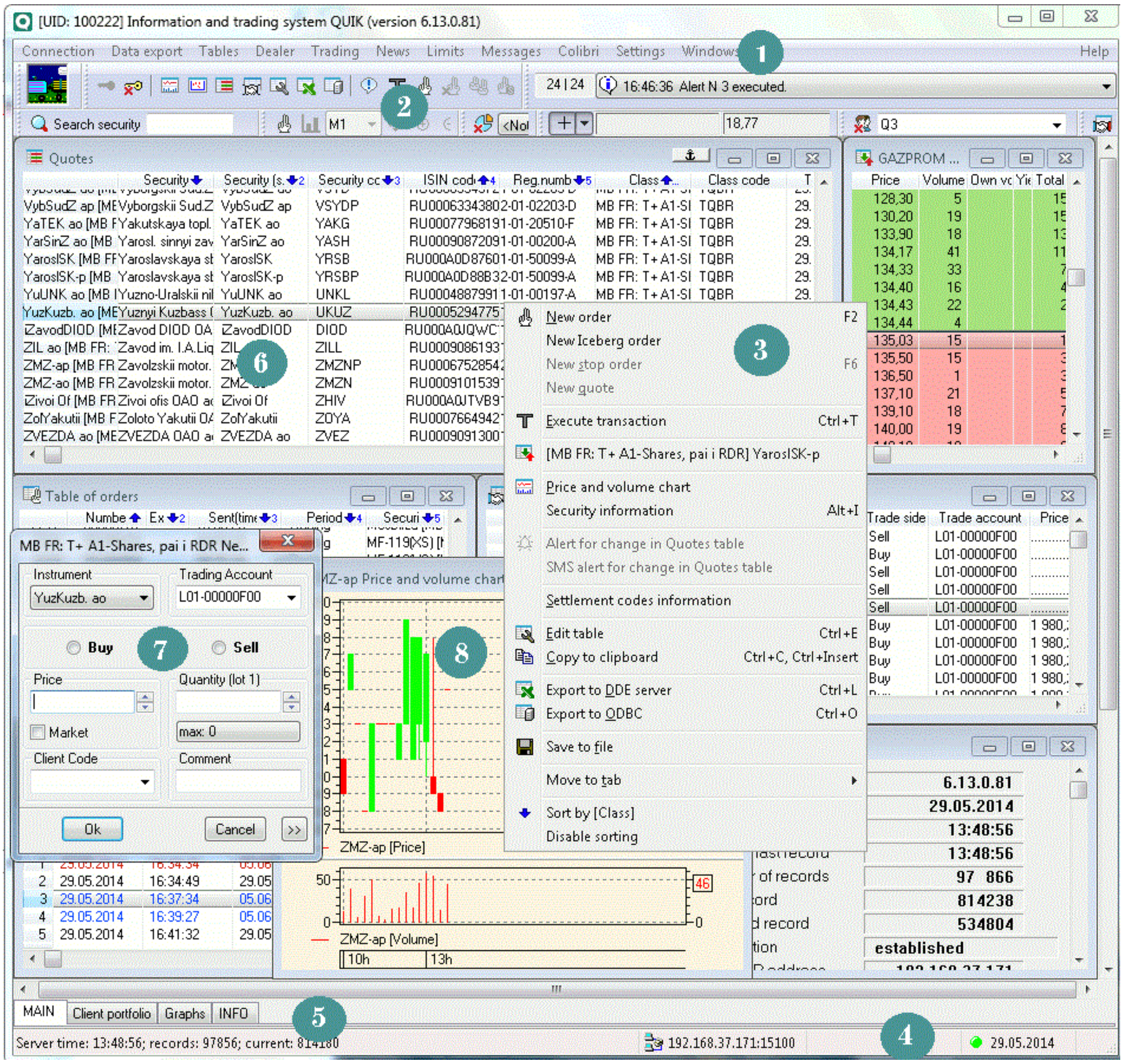
Section 2. Basic Operating Principles

2.1 Program interface



The basic components of the QUIK interface are as follows:

1. **Menu bar:** provides access to all program functions. The list of menu items and their purposes are described in sub-section 2.23.2.
2. **Toolbar:** contains buttons that provide quick access to frequently used functions.
3. **Shortcut menu:** appears after right-clicking on a window and contains the list of commands available through the active window.
4. **Status bar:** shows the status of the connection to the server and other system information.
5. **Tabs:** assists in organising windows and allows the user to quickly switch between windows.
6. **Tables:** shows data received from the server.
7. **Dialogue boxes**: includes boxes such as ‘Settings’ and ‘Order Entry’, which allow the user to enter specific parameters.
8. **Graphs:** used to display the trends for various market indices.

2.1.1 Using the menu bar

The menu bars are used to access all of the program functions. The set of menu items available depends on the QUIK user's authorisation to access rights to information and carry out specific operations. For example, the **News** menu is available if the user is granted access to receive news items.

In this QUIK User's Guide, menus and commands are presented in bold italics, which may be divided by a forward slash (/). For example, 'click **Connection / Connect...**' indicates that the user should first select the **Connection** menu and then click **Connect** therein.

2.1.2 Using the Toolbar

The toolbar is intended to provide quick access to the basic program functions. It includes a set of several panels that can be switched on or off, moved across the screen and arranged into rows. To enable a toolbar, right-click over an item, and then select (using left-click) the required item from the list of available toolbars. Alternatively, you may customise the toolbar by choosing **Settings / General...** and then selecting the specific items from the **Program / Toolbars** tab.

> **If all toolbars are disabled, the shortcut menu is not available, and the toolbars can only be enabled via the program menu.**

The toolbar icons can be either large or small (e.g.,  or ). The large icons are more visible, while the smaller icons take up less space on the screen. To adjust the size, click **Settings / General...** and then select or clear the **Large icons** checkbox in the **Program / Toolbars** tab.

When the cursor hovers over a toolbar item, the icon's purpose appears. The QUIK toolbars and their purpose as well as the section in which the description appears are shown below:

Toolbar	Purpose	Description
Standard	Connecting / disconnecting, customising tables and charts, handling orders	
Messages	Viewing and switching between program messages	2.17
Global client filter	Enabling / disabling the table filter for a specific client code	2.9.2
Global market filter	Enabling / disabling the table filter for a class of instruments	2.9.3
Personal tables	Opening tables with information about the user's positions, orders and trades	
Instrument search	Quick search tool for instruments amongst all available securities and opening tables and charts with information on the instruments found	2.8

Toolbar	Purpose	Description
Chart	Controls for the chart window, adding indicators and trends, scaling, and entering orders	4.2
Animated image	Animated 'train' indicator showing the progress for receiving data from the server	2.18

The purpose of the toolbar icons is described in sub-section 2.23.1.

2.1.3 Using the shortcut menu

The shortcut menu allows the user to customise and open new program windows to view information using the parameters selected in the current table.

To display the shortcut menu, right-click once. In some windows, double clicking may be used to activate some functions quickly (e.g., opening a chart or cancelling an order). To set up the program response to the right-click function, select **Program** / **Context menu** under **Settings / General**, and, then, select the required option in the **Right-click** group box.

2.1.4 Using the tabs

The tabs are designed to help position a large number of open windows and facilitate quickly switching between them. The tabs are 'labels' with names that may be placed above, below, to the right or to the left of the working area. One or more windows may be pinned to each tab, so that they are only displayed if the corresponding tab is selected.

For detailed instructions on using the tabs, see sub-section 2.14.

2.1.5 Using the status bar

The status bar shows the status of the various parameters of the program: the availability of the connection to the server, the server address, the transfer of data, new messages and alerts, currency units, etc. The status bar may be activated / hidden by selecting **Program / Toolbars** under **Settings / General**, and, then, selecting the **Status Bar** checkbox.

2.1.6 Using the 'hotkeys'

Many program actions may be launched by pressing certain combinations of keys called 'hotkeys'. If two or more keys must be pressed together, the QUIK User's Manual designates them as 'Ctrl+Q' (i.e., press the 'Ctrl' and 'Q' keys simultaneously). A special editor intended for setting up hotkey combinations is provided, which is available from the main menu **Settings / Hotkey editor** or may be launched by pressing 'Ctrl+H'. For a detailed description of the editor, see sub-section 2.22.
See the

List of Shortcut keys to section for the full list of keyboard shortcuts and their functions.

2.2 Data Structure

QUIK facilitates receiving information from several market sectors (various exchanges, trading modes, etc.). Securities, indices and other parameters characterising a unique data type are called financial or exchange **instruments**. Data of the same type or from the same market sector is grouped under **instrument classes**.

> **Example of classes: MOEX First-Tier shares, MOEX First-Tier bonds, MOEX indices.**

An instrument class contains the **instrument list,** which is a list of securities or indices. The instrument list agrees with the register of (listed) securities in the market sector.

> **Example of an instrument list: Rostelecom, LUKOIL, Sberbank-p.**

Each instrument class includes a **list of parameters,** which represents the trading trends for those instruments.

> **Example of a parameter list: highest bid price, highest bid volume, total bid volume.**

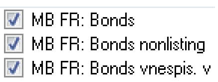
To exclude unnecessary values from the list, **filters** are used. The filtered data are not shown in tables.

2.3 Operations using classes

To select elements in a specific class, use **filters** or **drop-down lists.**

2.3.1 Selecting data from a class using a filter

To select a class, click on the required class or press the space bar on your keyboard. Click on it or press the space bar again to disable the selection. To select data within a class, use a filter.



Selection statuses for classes are as follows:

- indicates that all elements in the list have been selected, and the filter is not activated;
- indicates that some elements have been selected from the list using a filter;
- indicates that no elements in the list have been selected.

Upon deselection of a class using a set filter, the filter is not reset. If the class is selected again, the filter is re-activated. To disable a class filter, clear its checkbox ☑ or clear the list of selected parameters in the filter settings.

To select all available classes in a list, click **Select all**. If there are any pre-set instrument or parameter filters for any classes, the settings remain unchanged.

To cancel the selection for all classes, click **Clear**. If any of the classes contain a pre-set filter, the settings are saved.

2.3.2 Selecting data from a class using the drop-down lists

Classes in a drop-down list are indicated with '+' if the list is minimised and '-' if the list is expanded. To display the instrument list in a selected class, click '+' with your mouse or press the space bar. Click or press the space bar again to minimise the list.

To select data from a class, move the highlighted elements from the list of available parameters (the left panel) to the list of selected ones (the right panel) by clicking Add, Add all, Cancel or by left double clicking.

If allowed by the table type, the list of selected parameters may be rearranged by highlighting a parameter and moving it using the **UP** and **DOWN** buttons.

> **To select several consecutive parameters, press and hold the SHIFT key. To select several separate parameters, press and hold the CTRL key.**

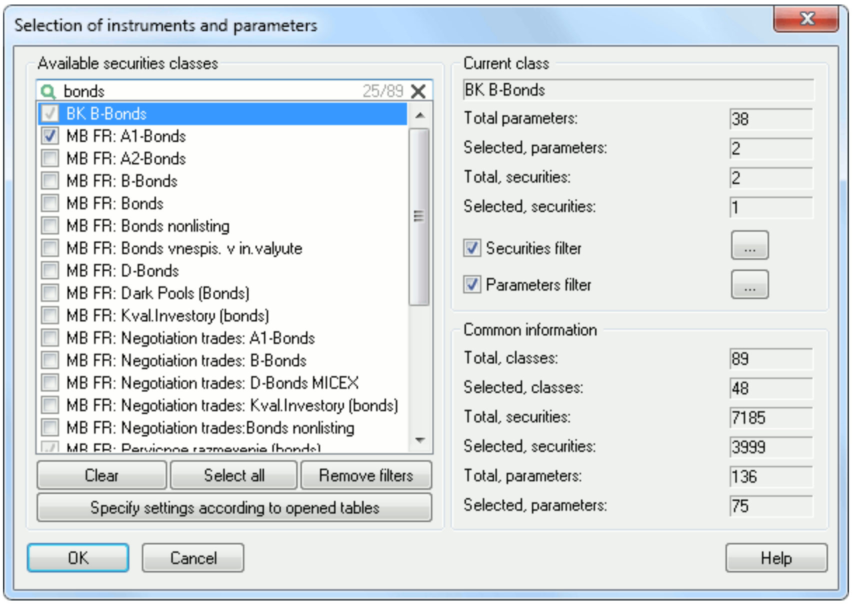
2.4 Configuring the flow of data

The QUIK server can transmit a considerable amount of information (data about many markets, instruments and parameters), some of which are not required by the user. To limit the flow of data received from the server, special functions are provided. These functions are very useful if the user connects to the server via low bandwidth channels or must pay the internet provider for the amount of user traffic.

2.4.1 Available securities

menu **Connection / Available securities...**

Configure the list of securities to be received and their parameters as follows:



1. Select the instrument classes for which data should be received. The full name of the current class and the values for the instruments and parameters are displayed to the right of the list of available classes.
2. The buttons below the **Available securities classes** list are used to modify the settings for all classes:

   - Click **Clear** to disable all classes;
   - Click **Select all** to select all classes;
   - Click **Remove filters** to clear all filters for all classes;
   - Click **Specify settings according to opened tables** to automatically customise the instrument and parameter filters, so that only those securities and parameters already displayed in the open tables are selected. If the user alters the settings for the tables, the settings for the data reception filters are altered in the same way.

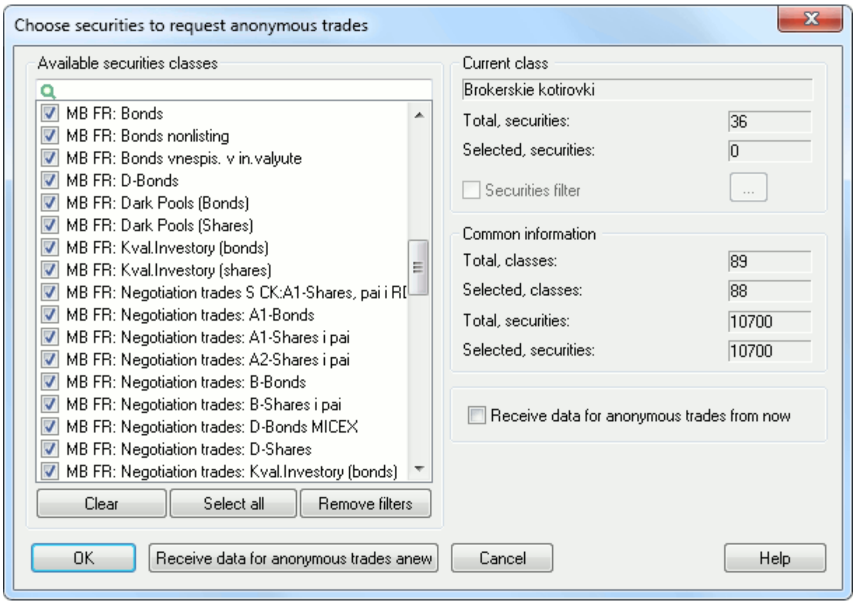
   > **If the option is enabled, not only opened windows are taken into account but parameters required for the calculation of margin indicators and purchasing power as well.**

3. For each class, the instrument filter and the parameter filter may be set. Use these if you need only some instruments from a class or you need to cancel the receipt of unused parameters. Those classes with set filters are shaded grey.
4. To save the flow of data settings, click **OK**.

2.4.2 Requesting data for anonymous trades

menu **Connection / Request data for anonymous trades...**

Configure the list of securities to view information on anonymous trades as follows:



1. Select the instrument classes for which trades are requested. The full name of the current class and the value for its instruments and parameters are displayed to the right of the list of classes.
2. The buttons below the **Available securities classes** list are used to modify the settings for all classes:

   - Click **Clear** to disable all classes;
   - Click **Select all** to select all classes;
   - Click **Remove filters** to clear all filters for all classes.

3. For each class, the instrument filter may be set. Use this if you need only some instruments from a specific class. The classes with set filters are shaded grey.
4. Tick the checkbox **Receive data for anonymous trades from now** to receive anonymous trades. If the checkbox is selected, information on anonymous trades will be sent from the QUIK server immediately from the instant a connection is made to the server. If the checkbox is empty (default settings), new information should be requested each time for anonymous trades after the last trade is available from the QUIK terminal.
5. Click **Receive data for anonymous trades anew** to delete all available information on anonymous trades (clear all tables and stored files) and request trade data again selecting the **Receive data for anonymous trades from now** checkbox.
6. Once you have completed setting the desired configuration for requesting trades, save the settings by clicking **OK**.

> 1. **When configuring the table for anonymous trades, only those instruments that have been specified by the user in the configuration dialogue will be initially selected. If none of the instruments has been specified in the anonymous trades request configuration dialogue, then none of them will be initially selected in the anonymous trades table configuration dialogue when it opens. If the instruments for which there are trades that are not requested (i.e., those instruments have not been specified in the configuration dialogue for**

anonymous trades) are added to the table, those instruments will be automatically added to the list of instruments for which anonymous trades are requested after the table configuration dialogue is closed.**

2. **If the table for anonymous trades is used as the basis for creating charts and configuring the export of data for technical analysis systems and the user selects an instrument for which anonymous trades have not been requested (i.e., it has not been specified in the anonymous trades request configuration dialogue), such instruments will be automatically added to the list of instruments for which anonymous trades are requested.**
3. **When Receive data for anonymous trades anew is set, the automatic cleaning of exported data on anonymous trades using ODBC and DDE is not provided. The user should clean that data manually. Restarting the QPILE portfolio should also be completed manually by the user.**

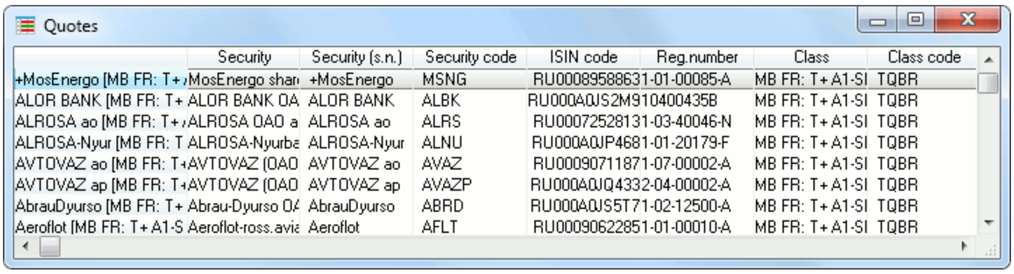
2.5 Tables

All data received from the server are shown in **tables**. Instruments or other elements (e.g., number of accounts, number of bids, etc. depending on the type of table) are displayed in the rows and parameters are shown in the columns.

All tables can be minimised (reduced to icons), dragged around the desktop using your mouse, viewed by scrolling, and otherwise handled using standard features typical for the Microsoft Windows operating system.

In addition to the standard features, the **Tables** menu offers the following settings:

- **Always on top**. If this setting is activated, the table is shown on top of all opened windows regardless of where it is positioned;
- **Lock window.** If this setting is activated, size and position of the window on the certain monitor and on the certain tab is fixed;
- **Remove title.** If this setting is activated, line with the window title is not displayed.



Quotes

	Security	Security (s.n.)	Security code	ISIN code	Reg.number	Class	Class code
+MosEnergo [MB FR: T+ /	MosEnergo shar	+MosEnergo	MSNG	RU0008958863	1-01-00085-A	MB FR: T+ A1-SI	TQBR
ALOR BANK [MB FR: T+	ALOR BANK OA	ALOR BANK	ALBK	RU000A0JS2M9	10400435B	MB FR: T+ A1-SI	TQBR
ALROSA ao [MB FR: T+ /	ALROSA OAO a	ALROSA ao	ALRS	RU0007252813	1-03-40046-N	MB FR: T+ A1-SI	TQBR
ALROSA-Nyur [MB FR: T	ALROSA-Nyurba	ALROSA-Nyur	ALNU	RU000A0JP468	1-01-20179-F	MB FR: T+ A1-SI	TQBR
AVTOVAZ ao [MB FR: T+	AVTOVAZ (OAO	AVTOVAZ ao	AVAZ	RU0009071187	1-07-00002-A	MB FR: T+ A1-SI	TQBR
AVTOVAZ ap [MB FR: T+	AVTOVAZ (OAO	AVTOVAZ ap	AVAZP	RU000A0JQ433	2-04-00002-A	MB FR: T+ A1-SI	TQBR
AbrauDyurso [MB FR: T+	Abrau-Dyurso OA	AbrauDyurso	ABRD	RU000A0JS5T7	1-02-12500-A	MB FR: T+ A1-SI	TQBR
Aeroflot [MB FR: T+ A1-S	Aeroflot-ross.avia	Aeroflot	AFLT	RU0009062285	1-01-00010-A	MB FR: T+ A1-SI	TQBR

To alter the column width, use your mouse to drag the column's boundary next to the column heading. To match the column width to the data width, double click the right column's border.

To adjust the width for all columns automatically, choose **Adjust columns width** under the **Tables** menu or press 'CTRL+W'.

1. **Any table may contain data from different instrument classes whose parameters may differ. In this case, the cells associated with a class not containing the required parameter remain empty.**
2. **The user may simultaneously create several tables of the same type for different data sets. Creating several identical tables does not increase the amount of data received from the server.**
3. **When choosing Connection / Reorder data, all instruments that have been removed from the trading system are deleted from all tables and filters.**

2.5.1 Configuring tables

QUIK offers several table types each of which has unique features. All tables, however, are configured the same way.

1. To create a table, choose the proper table type from the **Tables** menu. A configuration window for the selected table type is opened.
2. In the **Table name** textbox, the table's heading is displayed, which can be edited. By default, the heading matches the table type.
3. Select the parameters to be displayed in the table's lines and columns, following the rules applicable to operations for specific classes.
4. In some tables, both the parameters and the values may be filtered. For example, only orders for a specified account or only active orders may be displayed.

2.5.2 Editing a table

To edit an existing table, make it active and then click  on the toolbar, press 'CTRL+E', or choose **Edit table** from the shortcut menu.

2.5.3 Operations with filters in a table

1. To set up a filter, click '...'
2. In the window that opens, create the list of parameters to be used by highlighting them one by one in the list of available parameters and clicking **Add** or by clicking **Add all.** Click **Remove** to eliminate any unnecessary parameters.
3. To finish setting up the filter, click **OK**.

Press and hold the SHIFT key to select several consecutive parameters. To select several separate parameters, press and hold the CTRL key.

Filter settings may include additional options:

- If the **Include selected to filter** option is selected (default setting), the selected elements are shown in the table;

- If the **Exclude selected from filter** option is selected, the selected elements are not shown in the table;
- If the **Filter by prefix** checkbox is clear, only elements that exactly match those in the list of the selected values are filtered. If this checkbox is enabled, all elements that start with the specified characters are filtered.

Filter statuses are as follows:

- ☑ indicates that the filter is enabled;
- ☐ indicates that the filter is disabled.

To disable a filter, clear its checkbox ☑ by clicking it or clear the list of selected parameters in the filter setting window.

> 1. **The instrument or parameter lists may change over time (for example, if new securities are added to the exchange list). If the restricting filter is set according to that list, the data related to the newly added instruments are not displayed. To show the new data, add it manually into the filter or choose Settings / General and select the Add to all tables checkbox under Program / Data receiving.**
> 2. **If Connection / Reorder data is selected, all instruments that have been removed from the trading system are deleted from all tables and filters.**

2.6 Handling tables

2.6.1 Copy to Clipboard

The contents of a table may be copied to the Microsoft Windows Clipboard for use in other programs. To copy a table, click **Copy to Clipboard** in the active table’s shortcut menu or press ‘CTRL+C’.

2.6.2 Configuring the Copy to Clipboard function

To configure copying to the Clipboard, choose **Program / Clipboard** in **Clipboard** under the **Settings** menu.

- Select the **Copy row headers** checkbox to copy tables together with their row headers;
- Select the **Copy column headers** checkbox to copy tables together with their column headings;
- Select the **Formal presentation of data** checkbox to copy data in the appropriate format: headings appear as identifiers and text variables appear as numeric values;
- Select the **Copy blank cells instead of zeros** checkbox to save cells containing zeros as blank spaces.

Tables are usually copied together with their row and column headings.

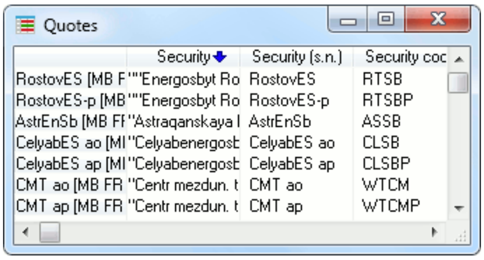
2.6.3 Saving to a text file

The contents of a table may be saved as a text file. The file format is specific to each type of table and described as a part of the corresponding table's properties. To save a table, click **Save to file** in the shortcut menu or choose **Export data to file** under the **Data export** menu**.** CP-1251 (Windows) is used for encoding.
The character ',' (comma) is used by default as the delimiter between parameters. The delimiter may be changed in the program settings by selecting **Use as fields delimiter** under **Save to text file** of the **Program / Data export** submenu under the **Settings / General** menu (see sub-section 2.19.1). This option is applicable when saving all table types listed in **Data export / Save to file** to a text file.

2.6.4 Exporting data to Microsoft Excel and ODBC

In addition to viewing data in the tables, QUIK offers the option for the dynamic export of information received from the server to other Microsoft Windows programs. Two methods of data export are used: copying to a Microsoft Excel spreadsheet and using ODBC (Open DataBase Connectivity), a Microsoft standard of information exchange between different data formats. For a detailed description of exporting data, see Section 6: Working With Other Programs.

2.6.5 Sorting the table rows by values



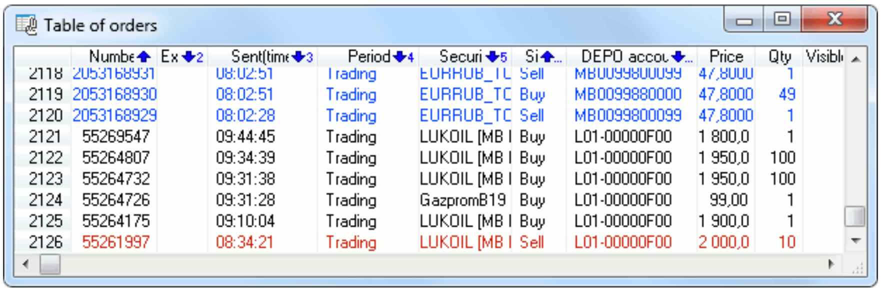
In some tables, it is possible to sort the rows relative to the values in a specified column. The reference column is marked by a sign indicating the direction in which data is sorted:

- indicates that rows are arranged in descending order from top to bottom;
- indicates that rows are arranged in ascending order.

Sorting is performed using one of the following methods:

1. Select **Sort by** under **Tables**, and then select the column heading from the list that appears for which data should be sorted. To reverse the order of sorting, select this column again.
   To disable sorting, select the default value.
2. Select **Sort by [<parameter>]** in the shortcut menu. The sign in the menu item shows the direction in which the column will be ordered. To reverse the order or direction, select this menu item again. To disable sorting, select **Disable sorting** in the shortcut menu.

3. Press and hold the 'Ctrl' key, and click on the column heading. To reverse the order of the sort, select this column again. To disable sorting, click on the left-most column heading (which should be empty). Selecting another column cancels the sorting order for the previous column.
4. Press and hold the 'Shift' key and click on the column heading. This allows you to simultaneously sort using more than one column. The order of sorting depends on the chronological order in which headings are selected. The data in the table is sorted by the values in the first column selected, and then by the second column selected, and so on.
5. The first sorted column is marked with ⬇, whereas all additional columns selected for sorting are marked with the icon and the number '2' to '5' indicating the sequence for sorting. For sorting by columns number 6 and up, ⬇ with an ellipsis '...' will appear.
6. To reverse the direction of sorting, click on the heading again whilst pressing the 'Shift' key.



	Numbe⬆	Ex⬇2	Sent(time⬇3	Period⬇4	Securi⬇5	Si⬆...	DEPO accou⬇...	Price	Qty	Visibl
2118	2053168931		08:02:51	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
2119	2053168930		08:02:51	Trading	EURRUB_TC	Buy	MB0099880000	47,8000	49	
2120	2053168929		08:02:28	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
2121	55269547		09:44:45	Trading	LUKOIL [MB I	Buy	L01-00000F00	1 800,0	1	
2122	55264807		09:34:39	Trading	LUKOIL [MB I	Buy	L01-00000F00	1 950,0	100	
2123	55264732		09:31:38	Trading	LUKOIL [MB I	Buy	L01-00000F00	1 950,0	100	
2124	55264726		09:31:28	Trading	GazpromB19	Buy	L01-00000F00	99,00	1	
2125	55264175		09:10:04	Trading	LUKOIL [MB I	Buy	L01-00000F00	1 900,0	1	
2126	55261997		08:34:21	Trading	LUKOIL [MB I	Sell	L01-00000F00	2 000,0	10	

7. To cancel sorting by more than one column, the above operation should be repeated on the left-most column heading (which should be empty) whilst holding the 'Ctrl' or 'Shift' key.

By default, columns with numeric values are sorted in descending order whilst those with character strings are sorted in ascending, i.e., alphabetical, order.
The sorting mode is activated immediately upon launching the program or loading once it is saved to the configuration file.

2.6.6 Duplicating a table

This operation involves creating a new table based on an existing one. To create a copy of a table or a chart, select **Tables / Make a copy** or press 'Ctrl+N'.
This feature is useful in the following cases:

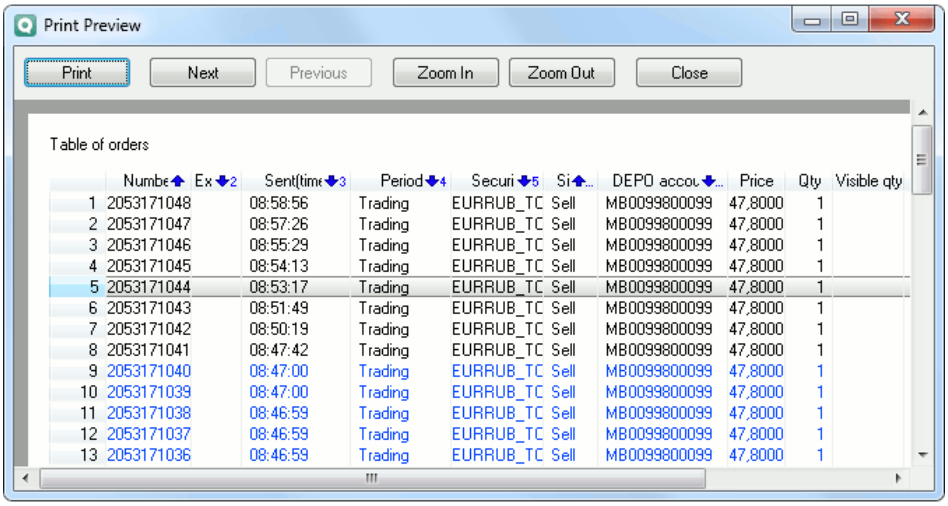
- When creating a table with the same parameters but using a different set of instruments or accounts;
- When creating a separate table with a filter for a selected parameter (for example, when you want to separate the transactions table into two tables for different accounts);
- When creating a similar table in another tab.

2.6.7 Printing a table

QUIK allows you to print table data. To print a table, select **Tables / Print...** or hit 'Ctrl+P'. Each page of the printout contains the table name and the page number.

To view or to edit the printer settings (i.e., default printer, page layout, paper selection, etc.) select **Tables / Printer settings...**. The default printer settings are taken from the operating system settings.

To preview the printout and see the table layout on the page, select **Tables / Print preview**.



	Numbe	Ex	Sent(time	Period	Securi	Si...	DEPO accou...	Price	Qty	Visible qty
1	2053171048		08:58:56	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
2	2053171047		08:57:26	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
3	2053171046		08:55:29	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
4	2053171045		08:54:13	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
5	2053171044		08:53:17	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
6	2053171043		08:51:49	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
7	2053171042		08:50:19	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
8	2053171041		08:47:42	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
9	2053171040		08:47:00	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
10	2053171039		08:47:00	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
11	2053171038		08:46:59	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
12	2053171037		08:46:59	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	
13	2053171036		08:46:59	Trading	EURRUB_TC	Sell	MB0099800099	47,8000	1	

The functions of the buttons in the Print Preview window are as follows:

Button	Function
Print	Closes the print preview window and sends the table to print
Next	Shows the next page
Previous	Shows the previous page
Zoom in	Enlarges the current page
Zoom out	Scales down the size of the current page
Close	Closes the window without printing the table

If any cells in the table are highlighted in colour, that highlighting will be reproduced in the printout.

2.6.8 Searching within a table

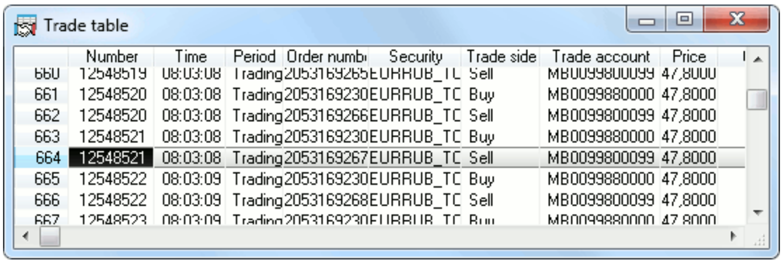
A table search is intended to look for a specific value within table cells, and is available in all QUIK tables.

To open the search window, select **Tables / Find...** or hit 'Ctrl+F'.

The search parameter functions are as follows:

- Select **Find** to enter the text or numeric characters for which you need to search;

- If the **Match case** checkbox is selected, a case-sensitive search is performed. If this checkbox is clear (the default setting), the search is not case sensitive;
- If the **Match whole word only** checkbox is selected, only a complete match of the word is shown in the results. If this checkbox is clear (the default setting), the search may return results which contain the characters you search for in combination with other characters;
- If the **Format as number** checkbox is selected (the default setting), the value you search for is numerical by default. You should select this option if a numerical value such as a 'price', 'volume', or 'quantity' should be found. If this checkbox is clear, the numerical values you search for are represented as text. If a parameter represented as text such as 'date' or 'time' should be found, you should leave this checkbox empty;
- The **Direction** checkbox is used to specify the search direction: select **Up** to search upward, row by row and from right to left on each row; select **Down** to search downward, row by row and from left to right on each row (the default direction).


Trade table

	Number	Time	Period	Order numb	Security	Trade side	Trade account	Price
660	12548519	08:03:08	Trading	2053169265	EURRUB_TC	Sell	MB0099800099	47,8000
661	12548520	08:03:08	Trading	2053169230	EURRUB_TC	Buy	MB0099880000	47,8000
662	12548520	08:03:08	Trading	2053169266	EURRUB_TC	Sell	MB0099800099	47,8000
663	12548521	08:03:08	Trading	2053169230	EURRUB_TC	Buy	MB0099880000	47,8000
664	12548521	08:03:08	Trading	2053169267	EURRUB_TC	Sell	MB0099800099	47,8000
665	12548522	08:03:09	Trading	2053169230	EURRUB_TC	Buy	MB0099880000	47,8000
666	12548522	08:03:09	Trading	2053169268	EURRUB_TC	Sell	MB0099800099	47,8000
667	12548523	08:03:09	Trading	2053169230	EURRUB_TC	Buy	MB0099880000	47,8000

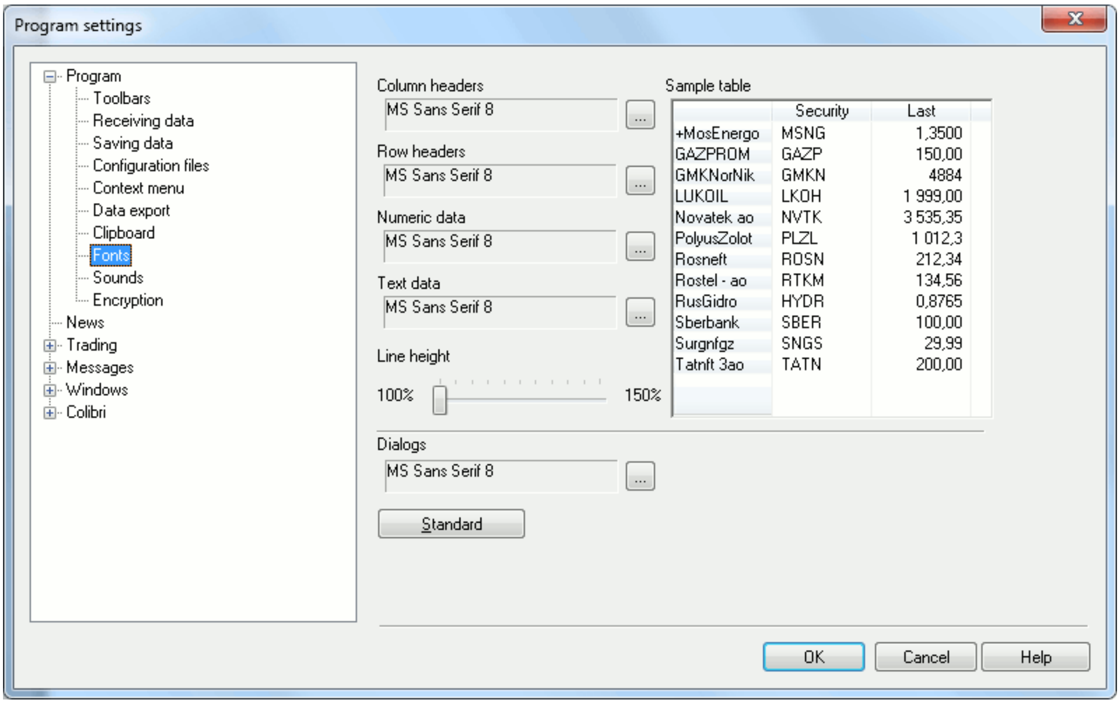
To find the next value within a table that matches the search conditions, select **Tables / Find next** or hit 'F3'.

> 1. **The search is performed on all table content including the row and column headings.**
> 2. **When searching for numeric values, both the comma and full stop (or period) may be used as the decimal separator.**

2.6.9 Customising table fonts

To improve the presentation of data, the table settings allow for the use of different fonts for row and column headings, text and numeric data, and dialogue boxes. It is also possible to adjust the line spacing.

To customise the font settings, select **Program / Fonts** under **Settings / General**.

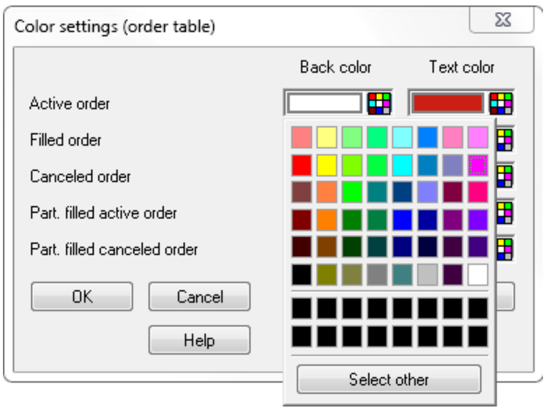


In the fonts' configuration window, select the appropriate font for the column or row headings and for the numeric and text data. The font may also be selected by clicking on the relevant item in the sample table.

Select **Line height** to change the line spacing within a table. The selected settings are shown in the **Sample Table** window. The font for dialogue boxes is set separately. To restore the default settings, click **Standard**.

2.6.10 Customising colours in tables and graphs

Some tables and graphs allow the user to customise image elements – e.g., font and background colours, etc. To select a colour, click on the icon in the dialogue window. A palette of 48 main and 16 adjustable colours will appear. Click on the desired colour from the palette to select a colour.



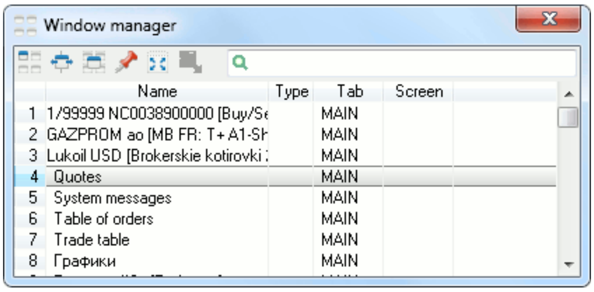
2.6.11 Adding a new colour to the palette

1. To open the colour selection dialogue box, click on **Select other** in the colour palette.

2. Click on the box to select a cell of complementary colours to adjust. By default, the first box will be adjusted if no cell is selected.
3. Select the desired colour by moving the cursor across the range of colours. Use the right scale to select the desired shade of colour. The resulting colour is shown in the **Colour | Background** box.
4. If you want to add a pre-set colour using well-known systems, specify the values in the **Hue**, **Saturation** and **Brightness** boxes (for the HSB system) or in the **Red**, **Green** and **Blue** boxes (for the RGB system).
5. Click **Add to palette** to add the specified colour to the additional colour boxes.
6. To close the dialogue box, click **OK**. The new colour will be added to the palette.

2.6.12 List of open tables on the terminal

The **Windows** item under the main menu shows the names of all tables open in QUIK. If selected from the list, the specific table will be shown on top. If more than nine tables are open, a complete list is shown in an individual dialogue box (see **Windows / Window manager** under the main menu).



To find a table on the terminal from the list of open tables, highlight it in the list and click **OK**.

2.7 Linked-windows mode

The linked-windows mode facilitates working with tables that display the progress of a trade. The main table under this operating mode displays the Quotes Table. Once an instrument in this table is elected, all linked windows change in relation to that instrument. The following tables can be linked to the Quotes Table:

- Level II Quotes Table;
- Time and Sales Table;
- Graph.

For example, once MosEnergo stocks are selected in the Quotes Table, the Level II Quotes Table will show the queue for the largest orders of these stocks, the Transactions Table will be filtered to show only the MosEnergo stocks, and a chart for this instrument will be shown.

To activate the linked-windows mode, click on the icon in the Quotes Table. Then, the same icon will appear on all windows that can be linked to this table. Click the icon to link the window to the source table.
When switching to another instrument, the settings for the linked windows do not change. In the charts, the settings for the technical analysis indices (except for the trends) remain the same.

> 1. **Linked windows can be attached to one Quotes Table in a tab. If the linked-windows mode is activated for another Quotes Table in the same tab, all linked windows will be attached to it.**
> 2. **If a linked window is moved to another tab where the linked-windows mode is activated for another Quotes Table, that window becomes attached to it. If there is no Quotes Table on the tab, the window is unlinked.**

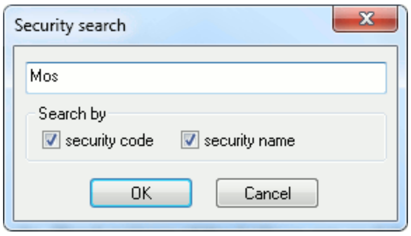
2.8 Quick search for an instrument

The quick search function was designed to facilitate easily accessing information about any instrument.
The search is performed using one of two methods:

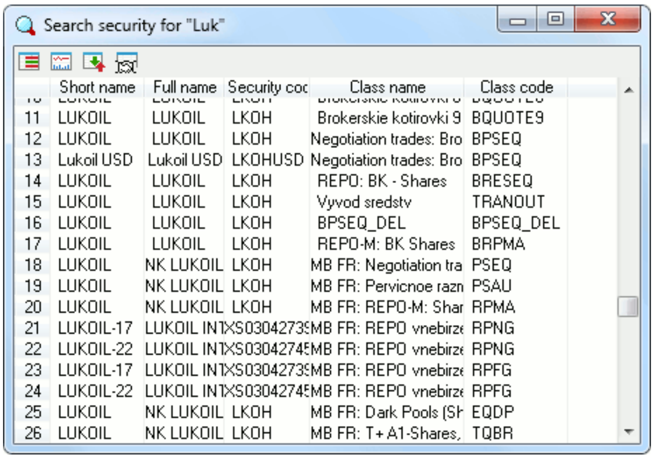
- Search using the special panel;

The toolbar contains a special panel. To start a search, type a part of the instrument name or code in the box and then hit 'Enter'.

- Search using the form



Hit 'Ctrl+Shift+F' to launch the instrument search form. Specify the search criteria in the window that opens.
The search result is shown in a special table which contains all instruments whose full or abbreviated name or code matches the substring entered in full or in part (as shown in the table below).



	Short name	Full name	Security coc	Class name	Class code
11	LUKOIL	LUKOIL	LKOH	Brokerskie kotirovki 9	BQUOTE9
12	LUKOIL	LUKOIL	LKOH	Negotiation trades: Bro	BPSEQ
13	Lukoil USD	Lukoil USD	LKOHUSD	Negotiation trades: Bro	BPSEQ
14	LUKOIL	LUKOIL	LKOH	REPO: BK - Shares	BRESEQ
15	LUKOIL	LUKOIL	LKOH	Vyvod sredstv	TRANOUT
16	LUKOIL	LUKOIL	LKOH	BPSEQ_DEL	BPSEQ_DEL
17	LUKOIL	LUKOIL	LKOH	REPO-M: BK Shares	BRPMA
18	LUKOIL	NK LUKOIL	LKOH	MB FR: Negotiation tra	PSEQ
19	LUKOIL	NK LUKOIL	LKOH	MB FR: Pervicnoe razn	PSAU
20	LUKOIL	NK LUKOIL	LKOH	MB FR: REPO-M: Shar	RPMA
21	LUKOIL-17	LUKOIL IN1	XS0304273	MB FR: REPO vnebirz	RPNG
22	LUKOIL-22	LUKOIL IN1	XS0304274	MB FR: REPO vnebirz	RPNG
23	LUKOIL-17	LUKOIL IN1	XS0304273	MB FR: REPO vnebirz	RPFG
24	LUKOIL-22	LUKOIL IN1	XS0304274	MB FR: REPO vnebirz	RPFG
25	LUKOIL	NK LUKOIL	LKOH	MB FR: Dark Pools (Sh	EQDP
26	LUKOIL	NK LUKOIL	LKOH	MB FR: T+ A1-Shares,	TQBR

The table has its own toolbar to handle the search results. The functions of the buttons are as follows:

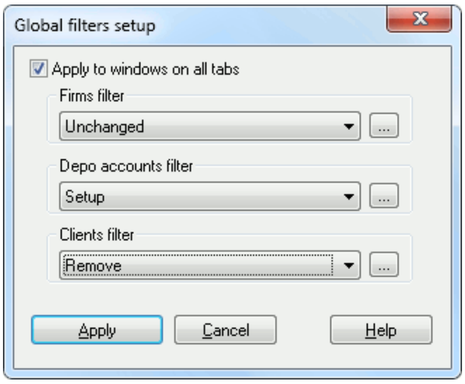
Button	**Function**
	Adds an instrument to the Quotes Table. If the table is unavailable, it will be created
	Creates a price / volume plot for an instrument
	Opens a Level II Quotes Table that displays the queues for the largest orders of an instrument
	Opens the Time and Sales Table filtered for a specific instrument

> **The results of each search are displayed in a separate window.**

2.9 Global filters

The **Global filters** feature allows the user to set up filters simultaneously for all tables or for all tables open on the current tab. This feature is useful in the following cases:

- Quickly set up a group of tables to display information that shows the orders, trades and limits for a selected client;
- Quickly switch between the tables for specified accounts or firms.



To activate this feature, select **Trading / Global filters...** or hit 'Ctrl+G'.

Global filter settings are saved to the configuration file (*.wnd) including when the program is closed. After reading the configuration file (e.g., when launching the program), the filter settings will be loaded and available for editing in the Global Filter Settings window.

2.9.1 Configuring the global filters

1. **Enabling the filter**. Click '...' to the right of the filter name and create a list of your choices. Click **OK** to save the changes. In the list of available operations, select **Setup**. To modify the settings of the relevant filters not specified in the tables, click **Apply**.

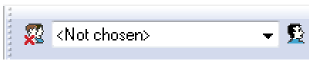
> **Configuring a filter with an empty list of selected parameters is equivalent to disabling the filter.**

2. **Disabling the filter**. Select **Remove** from the list of operations. To disable the relevant filters in the tables, click **Apply**.
3. For the filters for which the settings remain unaffected, select **Unchanged**.
4. If the **Apply to windows on all tabs** checkbox is selected, the filter setting modifications will apply to all tables in the program. If this checkbox is clear, only those filters for the tables in the active tab will be modified.

Click **Cancel** to close the window without modifying the filters.

2.9.2 Filtering by client code / name

To enable the global filter by client code from the toolbar, click **Global Client Filter** on the toolbar's shortcut menu.



The  icon '**Enter the client code from filter in the New order form**' works like a switch and is in the ON position if pressed or OFF when not. The icon position is saved to the configuration file (*.wnd) and restored upon launching the program.

1. If the icon is on and the Global client filter is shown in the program's toolbar, the client codes and trading accounts are entered into the order form as described below:

   - If a futures or option order is entered, the value from the filter is inserted into the Trading **account** box; the **Comment** field is filled by the value specified in configuration file of autofilling (see Section 5, sub-section 5.36: Configuring order entry fields autofilling). The **Client code** box will remain blank;
   - For all other orders, the value from the filter is inserted into the **Client code** box. The **Comment** field is filled by the value specified in configuration file of autofilling (see Section 5, sub-section 5.36: Configuring order entry fields autofilling).

2. If the icon is disabled and/or the filter is missing from the toolbar, filling in the boxes of the order form is not affected.

If a code is entered into the filter's entry box, the filtering of clients by this code is activated in all tables in the active tab. Thus, different filters can be set up for different tabs. To apply the global filter to all tabs, press and hold 'Shift' while selecting the class of clients.
The list of clients contains the client codes and names in alphabetical order (if the substitution mode is activated, see sub-section 2.21.1 for further details). The contextual search is also available. To find a required client, type the first characters of its code or name in the box and the cursor will move to the row with the matching characters.

To remove a filter, select **Not chosen** from the list or click .

> **1. The global filter by client code function 'Enter the client code from filter in the New order form' is given priority in relation to the default client parameter in the order entry settings and the client code auto-complete from a file settings (for further details, see sub-sections 5.2.11 and 5.36 of Section 5: Client Operations).**
> **2. Setting up or disabling this filter changes the client filter settings in the tables and does not affect the filters on other parameters.**
> **Upon selecting the Global filter, changes will apply to the Client filter in all tables displayed 'on all tabs'. Changes in the global filter also apply to newly created tables.**

2.9.3 Filtering by instrument class / market

To enable the global filter by instrument class / market from the toolbar, click **Global Market Filter** in the toolbar's shortcut menu.

The filter contains a list of available instrument classes. If a class is entered into the filter's entry box, all tables in the current tab show the values corresponding to that class. Thus, different filters can be set for different tabs. To apply the filter to all tabs, press and hold 'Shift' while selecting the class of instruments.

The drop-down list contains the instrument classes or names of markets listed in alphabetical order (if the description file markets.ini is found, see sub-section 2.21.2 for further details). The contextual search is also available. To find a required class of instruments or a market, type the first few characters of its name in the box and the cursor will jump to the row with the matching characters.

To remove a filter, select **Not chosen** in the list or click .

2.10 Working with tables in the drag-and-drop mode

2.10.1 Moving windows between tabs

To move a window to a tab, place the cursor on the window title bar and hit 'Ctrl'. The cursor will then look like this: . Hold the mouse and hit 'Ctrl' and, then, move the window to the desired tab. When this is done, the tab is highlighted with a different colour and the cursor changes to . Release the mouse.

If the cursor appears as , the window cannot be dragged to a tab.

> **This feature does not allow a window to be visible in all tabs.**

2.10.2 Adding instruments to tables

> **For tables consisting of only one column this functional does not work in "drag-and-drop" mode.**

Instruments may be removed from / added to the following tables:

- Options board;
- Options parameters table;
- Buy / Sell tables;
- Quotes Table;
- Tables with search results.

> **Instruments may only be removed from / added to a Buy / Sell table if the Select manually option is activated under the table settings.**

To add an instrument, position the cursor on the row with the desired instrument. Holding the mouse down, move the cursor to the desired table, and, then, release the mouse. The cursor changes to and a window with the instrument's name appears. The row with the new instrument will be added to the position just above the underlined location in the table.

If the cursor appears as , the instrument cannot be added.

IMPORTANT! The table does not allow adding the same instrument more than once.

To add an instrument to a table located on elsewhere, position the cursor on the tab, wait until the required tab is active and add the instrument to the table.

2.10.3 Removing an instrument from a table

For tables consisting of only one column this functional does not work in "drag-and-drop" mode.

Instruments can be removed from the following tables:

- Quotes Table;
- Buy / Sell (if the **Select manually** option is enabled in the table settings);
- Options board;
- Options parameters table.

To remove an instrument, position the cursor over the selected instrument, click and hold the mouse and move the cursor outside the table area and, then, release the mouse. The cursor changes to and a window with the deleted instrument's name appears.
If **Ask for confirmation when moving and deleting items using Drag-and-Drop** is selected in the **Tables** section under **Settings / General**, the system asks for confirmation before removing an instrument.

2.10.4 Replacing an instrument in a Level II Quotes Table

For tables consisting of only one column this functional does not work in "drag-and-drop" mode.

To replace an instrument in a Level II Quotes Table, select the desired instrument from the following tables:

- Quotes Table;
- Buy / Sell;
- Options board;
- Options parameters table;
- Tables of search results.

Click and hold the mouse and move the cursor to the selected instrument to the Level II Quotes Table and, then, release the mouse.
The cursor changes to and a window with the replaced instrument's name appears.

The window heading in the Level II Quotes Table changes to 'Brief name of instrument [class], Quote No.'.

If **Ask for confirmation when moving and deleting items using Drag-and-Drop** is selected in the **Tables** section under **Settings / General**, the system asks for confirmation before replacing an instrument.

To replace an instrument in a Level II Quotes Table located in the tab, position the cursor on the tab, wait until the desired tab is active and move the selected instrument to the Level II Quotes Table.

2.10.5 Changing the column order and removing them from a table

> **For tables consisting of only one column this functional does not work in "drag-and-drop" mode.**

This feature is available if **Move and delete columns using Drag-and-Drop** is enabled in the **Tables** section under **Settings / General**.

To change the column arrangement, position the cursor on the column heading, click and hold the mouse and move the cursor with the selected column to the desired location in the column heading area in the table and, then, release the mouse.

The cursor changes to and a window with the highlighted column's title appears. The column will be added above the underlined position in the table.

To remove a column, position the cursor on the column heading, click and hold the mouse and move the cursor outside the table area and, then release the mouse. The cursor changes to and a window with the deleted instrument's name appears.

If **Ask for confirmation when moving and deleting items using Drag-and-Drop** is selected in the **Tables** section under **Settings / General**, the system asks for confirmation before deleting an instrument.

> **While attempting to delete the table column containing values which are used in the filters of other columns using Drag-and-Drop the user is asked for permission. If the user confirms to continue the column is deleted and the corresponding filter is cleared. If the column is deleted while editing table then the corresponding filter is cleared without warning.**

2.10.6 Changing the row order

This feature is available in the following tables:

- Quotes Table;
- Buy / Sell (when the **Select manually** option is enabled in the table settings);
- Options parameters table.

IMPORTANT! The row order in the Buy / Sell table may only be changed if the Select manually option is enabled in the table settings.

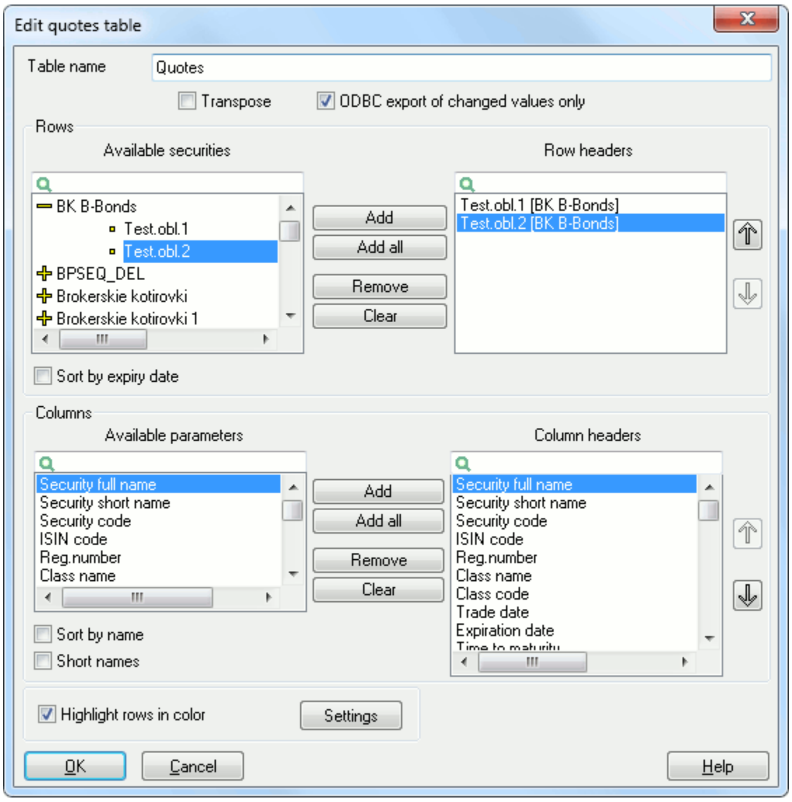
Position the cursor on the row, click and hold the mouse and move the cursor to the desired area. Release the mouse, and the row will be moved to the specified location in the table.

The cursor changes to  and a window with the moved instrument's name appears.

This feature is not available if the sorting function for any column is enabled.

2.11 Using the contextual filter

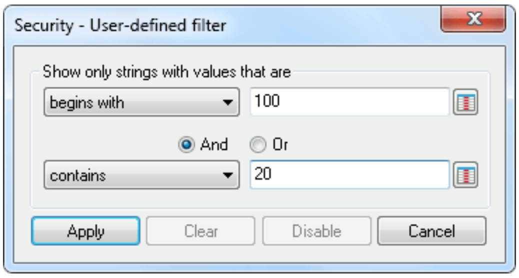
Use the search bar in the table settings dialogue box to filter using the lists of available items in relation to the characters entered by the user.
To find an item from the list, type the first few characters (irrespective of case). The number of matches and the total number of hits are shown in the section to the right of the search bar. The drop-down list shows the number of matches. To delete the text in the search bar, click ‘✕’.



To enable this option, check the **Contextual Filter for list boxes** checkbox in the **Program** section under **Settings / General**.

2.12 User defined filters

The user may configure a filter for each table column for all tables except the Level II Quotes Table, the News Window, the Transactions Pocket, the Quotes History Table, and the Quote Changes Table.



Check the **Use table filters** checkbox in the **Program / Windows / Tables** section under **Settings / General** to enable the filtering option.

To enable a filter, position the cursor on the column heading and hold it there for a moment until the icon appears in the heading area. Click it to open a form to configure the filter.

The name of the selected column for which a filter is configured is specified in the heading area. Click to select any other column from those available in the table. The value “Enter value” is selected by default.

The following conditions are available for numeric values:

- ‘equal to’;
- ‘not equal to’;
- ‘less than’;
- ‘less than or equal to’;
- ‘greater than’;
- ‘greater than or equal to’;
- ‘specified’;
- ‘not specified’.

The following conditions are available for character strings:

- ‘equal to’;
- ‘not equal to’;
- ‘begins with’;
- ‘does not begin with’;
- ‘ends with’;
- ‘does not end with’;
- ‘contains’;
- ‘does not contain’;

- 'specified';
- 'not specified'.

Click **Apply** to activate a filter using the above parameters. Once the filter is enabled, the icon changes to . To disable filtering, click and then click **Disable** in the window that launches.
To enable the filter, click and then click **Enable** in the form that opens.
To remove a filter, click **Clear**.

> **To function properly, the conditions set for filter must NOT include the characters '?' or '*'.**

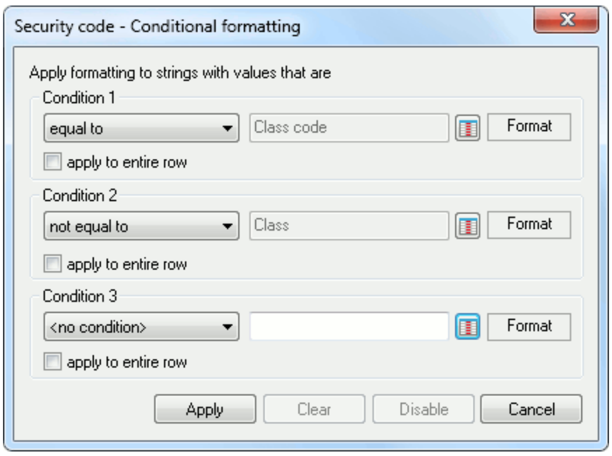
To disable, enable or clear the filter settings for all columns of a selected table, open the **Tables / Filters** menu and select the desired options or use the hotkeys:

- 'Disable all' ('Ctrl+Shift+Y');
- 'Enable all' ('Ctrl+Y');
- 'Clear all' ('Alt+Y').

The filter settings are taken into account when copying a table to the clipboard.
The filter settings are saved in the settings file and may be loaded from it.

2.13 Conditionally formatting tables

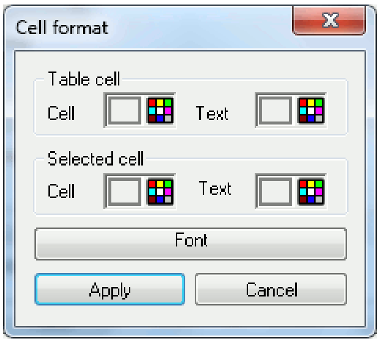
Parameters for conditionally formatting rows and cells may be set for each column for all tables except the Level II Quotes Table, the News Window, the Transactions Pocket, the Quotes History Table and the Quote Changes Table.
To enable this feature, select **Use conditional formatting** in the **Program / Windows / Tables** section under **Settings / General**.
To adjust the formatting of rows and cells, position the cursor over the column heading and hold it there for a moment until the icon appears in the window heading area. Click it to open the dialogue box for formatting rows and cells.



Once the conditions are set, the icon appears as .

The conditional formatting dialogue box and the description of the buttons located on the **Conditional Formatting** form are similar to those described in sub-section 2.12.

To set the colour parameters and the font, click **Format** and select the desired colour and font in the form that opens.



The selected font and colour settings are shown under **Format**.

If the **Apply to entire row** checkbox is enabled, the formatting set for a specific cell will be applied to the entire row that contains that cell.

1. **If the Apply to entire row option is enabled for more than one column, and more than one cell on the same row meet the conditions:**
   - if the formatting settings are the same, the row is formatted according to the settings specified for the right-most column. For example, if the conditions set for two columns include a background colour and the Apply to entire row option is enabled, the row will have the colour from the right-most column;
   - all of the rules specified for the columns will be applied to the row if different formatting rules are set for different columns.. For example, if the conditions set for two columns include a background colour for one column and a font colour for the other one, and the Apply to entire row option applies to both, the row will have the background colour set for the first column and the font colour set for the second one;
2. **The formatting rules set for a column are always applied to it irrespective of whether similar settings are set for another column with the Apply to entire row option checked. For example, if the conditions set for one column include only the background colour and those set for another column include the background colour, the font colour and the Apply to entire row option, the first column will be shown with the font colour indicated for the column to which the Apply to entire row option is enabled, and the background colour for the first column will be displayed as indicated under its settings.**
3. **The colour settings for a formatted table (defined in the table editing dialogue box) only apply to rows and columns for which similar conditional formatting options are not set. For example, if the Quotes Table settings include the striped shading for a table and some column formatting conditions apply a background colour, some cells will show the colour set in the formatting conditions, and not the colour set in the table editing dialogue box (striped shading).**
4. **If more than one formatting condition is set and met for a column, the settings will apply as follows:**

- Settings for a row are taken from the last of all conditions met for which the Apply to entire row option is selected;
- Settings for a column are taken from the last of all conditions met for which the Apply to entire row option is not selected. If such conditions are not enabled, settings for a column will be taken from the last of all conditions enabled for that column.

To change the settings of conditional formatting for all columns in a selected table, under **Tables / Formatting** select any of the following commands or use the relevant hotkeys:

- ‘Disable all’ (‘Ctrl+Shift+R’);
- ‘Enable all’ (‘Ctrl+R’);
- ‘Clear all’ (‘Alt+R’).

Settings for conditional formatting are saved to the settings file and may be loaded from it.

2.14 Tabs

menu **Windows / Setup tabs...**

To optimise the QUIK workspace, the tabs feature is used to form groups of windows. Each tab is represented on a special **Tab Bar**. Click a tab to make the group of windows related to it visible. The windows related to other tabs become invisible.

> **The user may not include some windows in a group. Those windows will remain visible regardless of which tab is selected.**

2.14.1 Available shortcuts

- Hit ‘Ctrl+B’ to open the tab configuration window;
- Hit ‘Ctrl+G’ to configure the custom filters for all tables in a tab;
- Hit ‘Alt+1’ ... ‘Alt+9’ to switch to a tab with the relevant serial number;
- Hit ‘Alt+L’ to adjust the size and location of all windows in the current tab.

2.14.2 Functions available from the shortcut menu:

- Select **Move to tab** to view the list of tabs.

To move a window to a tab, select the specific tab name. Select **Show in all** to cancel the move to the current tab and the window will be displayed in all tabs.

2.14.3 Configuring tabs

Select **Windows / Setting tabs** to configure the tabs and set the properties for the tab bar.

1. **Adding a new tab.** Type the tab's name in the entry box and click **Add**. A tab with the specified name will appear in the upper part of the window. If there is not enough room on the display for all tabs, scroll bars will appear on the right-hand side.
2. **Renaming a tab.** Click on the required tab with the mouse to make it active. The tab's name will appear in the entry box. Type the new name for the tab and click **Edit**.
3. **Deleting a tab.** To delete the current tab, click **Remove**. All windows associated with this tab will be transferred to the list of available windows.
4. **Adding windows to a tab.** Select the required window from the right part of the list of available windows and click **Add** to include the window in the list of all windows related to the active tab.
5. **Moving a window between tabs.** Select the window to be moved and click **Remove**. The window will be moved to the list of all available windows. From the left side of the window, select the tab to which the window should be added. Then, on the right side, select the name of the window to be moved, and click **Add**.
6. **Arranging tabs.** To change the arrangement of the tabs on the bar, use the <- and -> arrow keys.

2.14.4 Configuring the tab bar

1. **Location on the screen.** The tab bar may be positioned on the top, at the bottom (tabs arranged along a single line), on the right- or on the left-hand side (tabs aligned as a column) relative to the program's workspace.
2. **Arranging tabs along a single line.** If the tabs are numerous and cannot be arranged along a single line, those which remain are automatically moved to the next line. Select the **Single line** checkbox to scroll all visible tabs to the right and to the left, and all tabs will be displayed along a single line.
3. **Highlighting an active tab in the list.** Sometimes, it is convenient to see which tab is active, for example, if windows are grouped by instrument or client account (for a broker). Select the **Highlight active** checkbox to highlight the active tab.

2.14.5 Disabling tabs

Select **Windows / Hide tabs** to disable tabs and make all open windows visible. Then, the tab bar disappears from the display. Select **Windows / Show tabs** to activate the tab bar.

2.15 Working with windows

2.15.1 Dragging out the window

To drag out the window outside of the working program window:

- Drag the window out of the working program window using the mouse while keeping pressed Ctrl key. When dragging, the cursor takes the form of hand;

- Select the shortcut menu item **Change type** in Window manager table for the row with selected window;
- Press button on the toolbar of Window manager table for the selected row.

Displaying of the icon of dragged out window on the task bar is defined by setting **Show window icon on task bar** (see [2.19.5](#)).

> 1. **When dragging the window out it is removed from tab; when dragging it in, the window is fixed to the current active tab.**
> 2. **Dragged out window opened for the full size of the monitor can be dragged in using the shortcut menu item Move window to tab or by the function of Window manager.**
> 3. **If any dialogue window is opened on the screen size and position of the dragged out windows can be changed.**
> 4. **Linked windows mode is unavailable for dragging out.**

2.15.2 Window manager

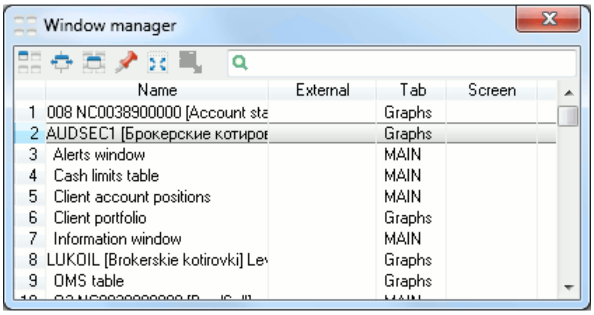
menu **Windows / Window manager...**

Purpose

Table includes the list of all opened windows.

The table is displayed always on top of other windows. Functions Dock window and Remove title cannot be applied to the table, icon of the table is displayed on the task bar of OS.

Table format

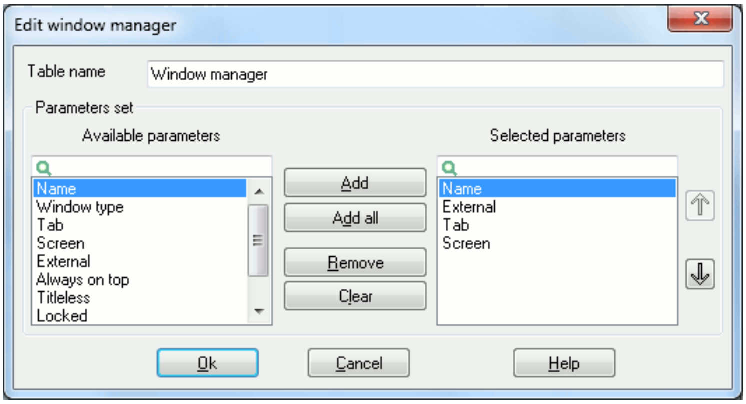


Each row of the table corresponds to the separate opened window. Table rows display titles of parameters:

Field	Description
Name	Name of the window
Window type	Short description of the window’s type
Screen	Screen number

Field	Description
External	Type of the window. Valid values: _ Yes – the window is dragged out of the working program window; _ <empty> – common window
Tab	Name of the tab
Screen	Number of monitor
Always on top	Attribute of displaying of the window over the other windows (Yes/<empty>)
Titleless	Attribute of displaying of the window without title (Yes/<empty>)
Locked	Attribute of fixation of the window size and position (Yes/<empty>)
Shown on task bar	Attribute of presence of the window icon on the task bar (Yes/<empty>)

Table configuration



1. Use **Table name** to assign the table a name other than the default name.
2. Use **Parameter Set** to select parameters for displaying in the table columns and to configure their sequence.
3. Value of the settings are saved and substituted when you reopen the dialogue.

Available shortcuts

Shortcuts available for this table can be called from the shortcut menu (by pressing the right mouse button on the table) or by pressing the appropriate button on the table's toolbar:

- Use **Activate**, button to activate the window. Use left double clicking on the line with the window title also allows activating this window;
- Use **Change type**, button to drag out the window outside of the working program window;
- Use **Lock window**, button to fix the window size and position;
- Use **Always on top**, button to place the window over the other open windows;
- Use **Remove title**, button to make the window title undisplayable;

- Use **Show on task bar**, button to display icon of the dragged out window on the task bar. The function is available only for dragged out windows. Default value is defined by the setting **Show window icon on task bar** (see 2.19.5).

> 1. **To select several rows of the table one after another keep the Shift key pressed. To select several rows of the table randomly keep pressing the Ctrl key.**
> 2. **When selecting several rows of the table the shortcut menu options are applied only to selected windows for which the function was not applied before.**
> 3. **To cancel the certain function for several rows of the table: if the function was not applied at least to one window from the group of selected windows (the appropriate button on the toolbar is not pressed and this command in the shortcut menu is not selected by tick) first apply the function to the group of selected windows, then cancellation of the function becomes available for the group of windows.**

Full list of executing keys for all types of tables see in
List of Shortcut keys.

2.16 Saving / restoring the configuration

2.16.1 Saving the display configuration

QUIK can automatically save the display configuration each time the program is closed including the location of and settings for windows. To enable this feature, select **Save settings to file upon exit** in the **Program / Configuration files** section under **Settings / General**. The program allows the user to save settings to a default file that can be replaced if necessary.
In addition to saving the configuration upon exit, QUIK allows you to save the configuration to a file manually. To save the configuration, select **Settings / Save windows configuration to file.** This option protects the configuration settings from accidental changes and allows multiple users to share a terminal whilst applying their individual preferences to the system.

2.16.2 Restoring the display configuration

To load the display configuration from a file, click **Settings / Load windows configuration from file** and, then, select the specific file with the saved settings. When the settings are loaded from a file, the windows of the previous configuration may be either closed or allowed to remain open and merged with the previous configuration in the display. Select the **Close all windows before loading the configuration file** checkbox to enable this feature.

> **When loading data from files created In later versions of the QUIK Workstation relative to the one which is currently used then the notification of the following view appears: "<File name> configuration file was created by the newer version**

> **of the QUIK terminal. Current version cannot load it properly. Continue this file loading?”.**

Example of transferring a table from one configuration to another:

1. Open the configuration window that includes the table to be transferred.
2. Close all windows in it except the table to be transferred.
3. Save the configuration to a file with a new file name.
4. Select **Program / Configuration Files** under **Settings / General** and clear the **Close all windows before loading the configuration file** checkbox.
5. Load the configuration file which should be applied to the table. Now, all windows from that configuration and the table to be transferred that was not closed when loading the new configuration will be displayed.
6. Save the configuration to a file.

Items with complex settings such as charts or groups of tabbed windows can be transferred the same way.

2.16.3 Default configuration of windows

The user may set up a default display configuration. This facilitates mastering the program and familiarisation with frequently used windows. Additionally, the user may quickly restore the original settings under **Settings / Restore default windows configuration**.
The default settings are saved to default.wnd located in the QUIK directory.

2.16.4 Automatically saving the windows configuration

To avoid problems associated with restoring the windows configuration after various malfunctions (e.g., unexpected power failure, etc.), a feature is provided to automatically restore the most recent configuration from a backup copy. A backup file is saved automatically when the user exits the program or saves the windows settings to a file. In doing so, the previous version of the configuration is saved to a file with the following name:

```
<config_file_name>.wnd.sav
```

For example, when exiting and autosaving a new configuration to the file info.wnd, the backup file info.wnd.sav is created. If the **Make a backup copy when saving settings to file** checkbox is enabled, the configuration’s version is saved to a file with the following name:

```
<config_file_name>.wnd.<yyyymmdd_hhmmss>
```

For example, for info.wnd, we will have a backup file with the following name:

```
info.wnd.20141509_210419
```

If the windows settings are saved under **Settings / Save windows configuration to file**, the previous version of the configuration is saved to a file with the following name:

```
<config_file_name>.wnd.<dd_mm_yyyy>.<hh_mm_ss>
```

For example, for info.wnd, we will have a backup file with the following name:

```
info.wnd.15_12_2004.20_04_19
```

To disable the configuration autosave feature, clear the **Make a backup copy when saving settings to file** checkbox in the **Program / Configuration files** section under **Settings / General**.

2.17 System messages

2.17.1 Messages table

menu **Messages / System messages / Messages table...**

Purpose

The table is used to display all system error messages, trading system alerts and administrator notifications. The QUIK system's and plug-in's (Modules and QUIK system's applications) messages received during the current session as well as stored messages from the previous sessions are displayed in the table.

The messages displayed in this table are also available for viewing in the "QUIK: Messages window" (for details, see 2.17.2).

Table format

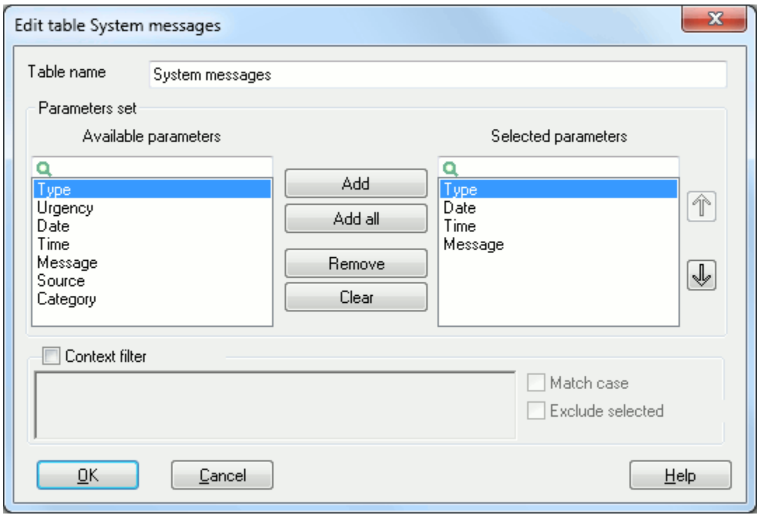
Each table row corresponds to a system message. The headings of the displayed parameters are shown in the table's columns:

Field	Description
* Type	Type of the system message. Valid values: _ – informational message; _ – warning; _ – error message
Urgency	Message severity. Valid values: _ – important; _ <> (empty) – normal
* Date	Message creation date

Field	Description
* Time	Message creation time
* Message	Message text
Source	Message source: _ For messages received from the QUIK server the field is not filled; _ For messages received from plug-ins the filed contains the name of the plug-in
Category	Message category. The field is used for plug-ins' messages only

* – parameters selected by default.

Table configuration



1. **Table name** allows you to enter a table name other than the standard one.
2. **Parameter set** allows you to select parameters and to specify their sequence in the table columns.
3. **Context filter** – message body filtering. Only those messages with the text containing at least one substring match for the specified values are displayed in the table. The values are separated by semicolon.

   _ **Match case** – filter values are case-sensitive if the checkbox is selected. If the checkbox is disabled the filter is case insensitive;

   _ **Exclude selected** – values specified in the list are excluded from the filter.

Available Functions

Data from the table can be copied, output via DDE server, or exported via ODBC.
A complete list of shortcut keys for all types of tables is given in the
List of Shortcut keys. Functions available for this table can be launched from the shortcut menu by right-clicking on the table:

- **Clear messages** deletes all messages from the storage and all opened tables;

- **Save messages from table to file** saves messages from the table to a text file. Messages parameters are saved to a file according to the order of selected table's columns;
- **Save all messages to file** saves all available messages from the table to a file. Messages parameters are saved to a file in the following format:

Field	Description
Type	Type of the system message. Valid values: _ 1 – informational message; _ 2 – warning; _ 3 – error message
Urgency	Message severity. Valid values: _ 0 – normal; _ 1 – important
Date	Message creation date
Time	Message creation time
Message	Message text
Source	Message source: _ For messages received from the QUIK server the field is not filled; _ For messages received from plug-ins the filed contains the name of the plug-in
Category	Message category. The field is used for plug-ins' messages only

Messages table configuration

To configure Messages table use the menu item **Messages** under **Settings/General...:**

- **Delete messages at startup.** All messages from the previous sessions are deleted from the Messages table when starting the program;
- **Save for the last ... days**. The setting defines the period of storing of the received messages. At the expiration the messages are deleted at the next start of the program.

2.17.2 Messages window

menu **Messages / System messages / Show** or

The message window is used to display QUIK runtime information, error messages, trading system alerts and administrator notifications.

Messages window displays only the messages received during the current session.

When receiving a new message, the window appears automatically. To open it manually, click on the toolbar or select **Show** under **Messages / System messages.**

The functions for copying the selected text are available in the shortcut menu by right-clicking the message:

1. **Copy** or Ctrl+C – copy the message text to a clipboard. This option is available only for selected text.
2. **Select all** or Ctrl+A – select the message text for copying.

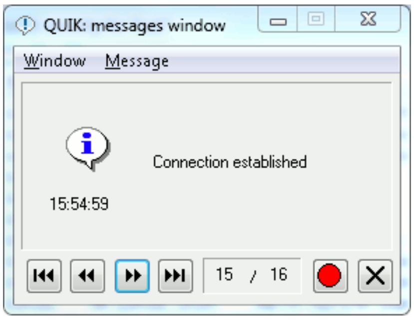
Links from the message text are opened in Internet browser set by default. To follow the link click left mouse button on the link text.

Viewing a message list

The message window may contain more than one message. By default, only the last message received is displayed. '**NN/MM**' in the information box located under the message text indicates the current message number (**NN**) and the total number of messages received (**MM)**.

1. To view other messages, use the following buttons:

   - Click to jump to the first message;
   - Click to move to the previous message;
   - Click to move to the next message;
   - Click to jump to the last message.



2. To clear the message list, click or select **Clear** under **Messages / System messages**.

> **The message storage and all opened tables with messages are cleared when cleaning up the list of messages.**

3. To close the message window, click or hit 'Esc'.

Customising the message window

To configure the message window, select **Messages** under **Settings / General**:

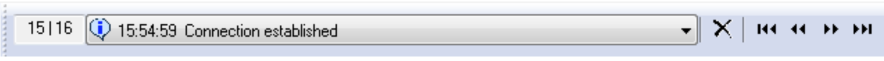
- **Show message window** enables / disables the appearance of the window upon receipt of a new message;

> **Two-factor authentication messages as well as important messages (containing in the Urgency field) are displayed on the screen independently from the value of the Show message window checkbox.**

- **Show all text of the message** resizes the window so that the entire text of a new message is visible.

Locating the message box on the toolbar

The message window can be compactly placed on the toolbar.



To view the list of all previous messages of the current session, click on the box using your mouse.

Message box settings

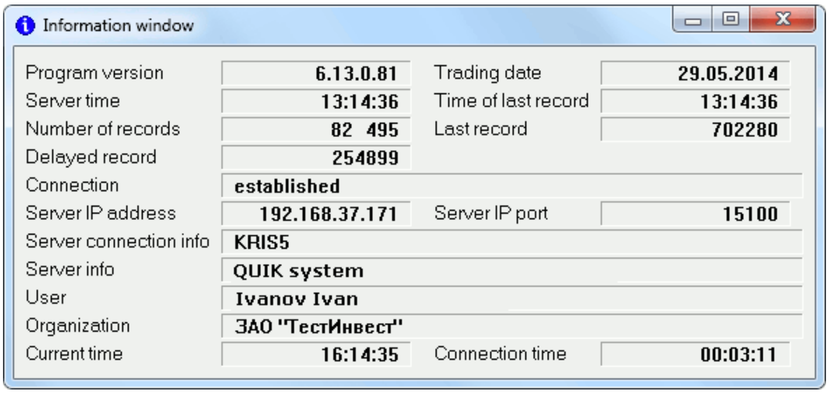
1. Click Program / Toolbars under Settings / General.
2. Click on the Messages checkbox.
3. Click OK. A message box will appear on the toolbar. Situate it on the screen so that the entire message is visible.

> **Showing the window upon receipt of a new message may be disabled (for details, see sub-section Customising the message window).**

2.18 Monitoring the connection status

The connection to the server is monitored in several ways.

1. The **Connection status indicator** is located on the right-hand corner of the status bar, and shows the date of the trading session received from the server (for example, data from the previous trading session may be downloaded on the following morning). If the indicator does not show a date, no data has been received. The LED colour indicates the connection status: green indicates that a connection has been established and the information is up-to-date, while yellow indicates that a connection has not been established and the information is not up-to-date (the date of the last update is shown).
2. The **Information window** shows the full set of statistical parameters used to monitor the connection status. To configure the window, select **Connection / Information window...**.



3. The **Train indicator** located on the right-hand side of the toolbar looks like a moving train. When this is moving, it indicates that data is being downloaded from the server. If the train is not moving, new data is not being transmitted and a problem with the connection has been detected. If a connection has not been established, the train does not appear.

2.18.1 Information window fields

Field	Description
Program version	Program version serial number
Trading date	Trading session date
Server time	Time of last update to the Quotes Table
Time of last record	Time of receipt from the server for the last record (data chunk)
Number of records	Number of records received from the server
Last record	Number of the last record received
Delayed record	Number of the last delayed record received (as a result of restoring missing data after a connection time out)
Connection	Status: Connected / Disconnected
Server IP address	Internet address of the QUIK server
Server IP port	Number for the QUIK server access port
Server connection info	Description from the list of available connections
Server info	Server name
User	User name (entered when signing on)
Organization	User's organization or firm (entered when signing on)
Current time	Time from the user's computer clock
Connection time	Duration of the connection to the server

Field	Description
Trading session identifier*	Unique identifier for an individual trading session
User code*	User code on the QUIK server
Storage reserved*	Reserved memory space, not used
Messages sent*	Number of sent messages
Total bytes sent*	Total amount of outgoing traffic sent during the current connection
Useful bytes sent*	Amount of significant outgoing data sent during the current connection
Data sent per second*	Amount of data sent during the last second
Messages received*	Number of received messages
Useful bytes received*	Total amount of significant incoming data received during the current connection
Total bytes received*	Total amount of incoming traffic received during the current connection
Data received per second*	Amount in bytes received during for the last second
Average transfer rate*	Ratio of amount in bytes sent / connection time (sec)
Average receive rate*	Ratio of amount in bytes received / connection time (sec)
Time of Last Round-Trip**	Time of the last Round Trip Time test (data delay measurement)
Round-Trip Time**	Last Round Trip Time value in seconds
Average Round-Trip Time**	Average Round Trip Time value in seconds for the current connection
Maximum Round-Trip duration**	Time of the maximum Round Trip Time occurred during the current connection
Time of Maximum Round-Trip duration**	Maximum Round Trip Time for the current connection in seconds

* – extended data set,

** – server connection monitoring parameters, see sub-section 1.5 of Section1: Before starting.

2.19 Configuring the QUIK client interface

To configure the QUIK interface, select **Settings / General...**

2.19.1 Program

1. **Show logo** – enables / disables showing of the QUIK logo upon program launch.

2. **Establish connection** – enables / disables opening of the dialogue box to establish a connection to the server upon program launch.
3. **Update program version** – to automatically (upon establishing a connection) check whether a new version of the program is available from the server. If a new version is found, the program offers to download the files and update the program to the current version. If there is no need to check for an available update, de-select this option.
4. **Confirm program exit** – to ask the user to confirm before shutting down the program.
5. Select **Sound off** to deactivate sound signals for all QUIK messages and events.
6. **Show complete option codes** – to display the full option codes in the headings of the Level II Quotes Table. If this option is disabled, the abbreviation for an option is used; if enabled, the option name is formulated as follows:

    option name = underlying_asset's_short_name + maturity_date + option_type_(p for put, c for call) + strike

    This setting is useful for distinguishing between futures-style and non-futures-style options. Disable this option if you wish to distinguish between options using abbreviations.

7. **Use numerical separators in entry forms** – to show the price and quantity (volume) using numerical separators in all entry boxes (e.g., '1,234,567.89').
8. **Contextual Filter for list boxes** – to search for values in the table configuration dialogue box with reference to a string entered by the user.
9. **Context-based search in dropdown lists** – to search for an item included in the list using the first few letters entered from the keyboard. For example, this feature allows the user to search for an instrument name or a client code.
10. **Show date and time of the trading data considering the local time zone** – to show date and time of the exchange data in the tables, time in the transaction input fields and in the system messages table depending on the time zone of a computer on which a QUIK Workstation is launched. The setting is applicable to the following tables:

    - Table of orders;
    - Trades table;
    - Table of stop orders;
    - Time and Sales table;
    - Trades for execution;
    - Negotiated deal orders;
    - Reports on trades for execution;
    - Alerts window;
    - Transactions Table;
    - Quotes table;

- Quotes Changes Table;
- Quotes History table;
- Trader messages window;
- Market-maker liabilities for derivatives market;
- Table of algorithmic orders (see the description in “Algorithmic orders” User’s Manual, section 2);
- OMS order table (see the description in “OMS Manager Module” User’s Manual, section 2).

11. **Hide user name in application title** enables displaying of the user name in the program title. If the checkbox is enabled the program title contains only the User’s UID in square brackets. By default, the checkbox is disabled.

Toolbars

1. Select the toolbars to be displayed from the list under **Toolbars**.
2. **Large icons** – to increase the size of the buttons that appear on the Toolbar.
3. **Controls** offers the following options:

Status bar shows / hides the status bar at the bottom of the screen.

Scroll bars hides / shows the scroll bars in the program's workspace if the windows extend beyond the visible area on the screen.

> **Toolbars may be selected for display through a shortcut menu available from the control panel.**

Receiving data

Data receipt can be configured under **Program / Data receiving**. The configuration process is described in sub-section 1.5.1 ‘**Configuring the Data Reception and Saving Data Parameters**’ (see Section 1: Before Starting).

Saving data

To configure the saving of data, select **Program / Data storing**. The configuration process is described in sub-section 1.5.2 of Section 1: Before Starting.

Configuration files

The process of saving / restoring the configuration settings is described in sub-section 2.16.

Context menu

1. **Show inactive items** – to launch a pop-up shortcut menu for all operations available in the current window. Currently unavailable inactive items are highlighted in grey. If this option is disabled, the pop-up shortcut menu only shows available operations.

2. **Right-click** – to allow the user defining functions available through right-clicking:

Kill order cancels orders in the Orders Table, the Stop Orders Table or the OTC Orders Table through a right double click of the mouse.

Context menu activates the shortcut menu by right-clicking the mouse.

Order cancellation and context menu activates the shortcut menu through a single click or cancels an order in the Orders Table, the Stop Orders Table or the OTC Orders Table by right double clicking the mouse.

Data export

To configure the parameters for exporting data to text files, select **Save to text file** under **Program / Data Export**:

1. **Copy firm name instead of ID** – to substitute the counterpart firm's name with its abbreviation when saving values from Orders Tables, Trades Tables and Negotiated Deals Tables to a text file.
2. **Use as fields delimiter** – to specify the character for the separation of values in a text file. By default, a ',' (comma) is used. This setting assumes that it is possible to use a character.

Configure the DDE export parameters in **DDE Export** group box under **Program / Data Export**:

1. Time during which data receipt confirmation is pending if the whole table is exported, sec (1-3600) sets a waiting period for the initial data transfer, where the recommended value is 60.
2. Time during which data receipt confirmation is pending if the next row is exported (1-600) sets a waiting period for updating data, where the recommended value is 30.
3. Number of attempts to resume if export fails sets the number of permitted attempts to restore the connection when a transmission fails. The default value is 0.
4. New thread for each DDE server enables multithread data export to different DDE servers. The default setting is OFF.
5. MS Excel supports localised versions of Microsoft Excel for different languages. The default language is English. If a Russian version of Microsoft Excel is available, this feature allows the use of English or Russian.

Settings 1-3 are used to configure the handling of timeouts if the DDE server is busy.

> **To avoid interruptions in the transfer of data caused by a busy DDE server, the second parameter may be increased to 40 seconds (e.g., when configuring formulas in a Microsoft Excel spreadsheet).**

Clipboard

See sub-section 2.6.1 to configure saving to Clipboard.

Fonts

See sub-section 2.6.9 to configure program fonts.

Sounds

These settings are used to assign distinctive sounds for various events such as incoming messages, order execution, etc.

The list of events is subdivided into groups. To expand a group, click '+' located to the left of the group's name.

To assign a sound to an event, select the event from the list, which will open a window in which the user may select a *.wav file from those available on the user's computer. The simplest option is to use standard Windows audio files, which are located in the following folders by default:

- for Windows XP\Vista\7 – C:\windows\media;
- for Windows 2000 – C:\winnt\media.

A selected audio file can be heard by clicking . To select another file, click . To cancel the signal set for an event, select (None) in the **WAV file name** window.

In addition to setting distinctive sounds for each event, it is possible to set up a single signal for all events in a group. For this purpose, select the checkbox for a group. The status of the settings for each event is displayed using the following icons:

- means a sound has not been set;
- means an individual sound has been set;
- means a sound for a group has been set.

If sounds are set for a group and for a particular event in the group, the individual sound will be applied for that event. For events that do not have specific settings, the common group signal is applied.

Encryption

The configuration process for encryption is described in sub-section 1.10.1 of Section 1: Before Starting.

2.19.2 News

The configuration of news parameters are found under **News**:

1. **Save for the last … days** sets the period of time for storing received news items. Upon expiry of that period, the stored news items are deleted upon program launch.
2. **Mark as read after … seconds** sets the period of time after which any news items selected using the cursor will be marked as read.

3. **Request news body + title** ensures that the news item (message) is downloaded from the QUIK server together with the heading. If this feature is disabled (default setting), the caption under the **News** box must be selected in order to receive the body of the news item.
4. **Request news from now** ensures that news items are received from the server once a connection with the QUIK serve is established. If this feature is disabled (default settings), news items that have not been received since the last news items became available on the QUIK terminal are requested.

2.19.3 Trading

The trade settings are described in sub-section 5.2.11, Section 5: Client Operations.

Orders

The order entry configuration is described in sub-section 5.2.11, Section 5: Client Operations.
In this section, the following settings are described:

1. **Entry Forms** are described in sub-section 5.2.11, Section 5: Client Operations.
2. **Client Orders** are described in sub-section 7.36.2, Section 7: Broker Operations.
3. **Algo orders** are described in the **Algorithmic orders** User's Manual, sub-section 8.2.
4. **OMS orders** are described in the **OMS Manager Module** User's Manual, section 22.
5. **Negdeal orders** are described in sub-section 5.2.11, Section 5: Client Operations.

Closing positions

The parameters for closing positions are described in sub-section 5.2.11, Section 5: Client Operations.

Client portfolio

The parameters for working with the client portfolio are described in sub-section 5.2.11, Section 5: Client Operations.

Quotes

The parameters for working with quotes and unit quotations are described in sub-section 5.2.11, Section 5: Client Operations.

Currency unit

Changing the currency unit results in the conversion of all values in the program tables into another currency.
To select a currency unit, follow these steps:

1. Select **Connection / Available securities…**. Ensure that the list includes the **Cross Currency Rates** class and check that this is selected for receipt from the server.

2. Select **Settings / General...** section **Trading / Currency unit** and select the required currency unit from the list, and click '**OK**'.

   To cancel the conversion of all values into another currency, select **Default Currency Unit.**

Digital Signature
The parameters for configuring the digital signature are described in sub-section 5.2.11 of Section 5: Client Operations.

2.19.4 Messages

To set up the messages window, see sub-section 2.16.2.

Trader messages
The trader message settings are described in sub-section 3.8.4 of Section 3: Viewing information.

Local messages
The settings for local messages are described in sub-section 3.9.13 of Section 3: Viewing information.

2.19.5 Windows

1. **Dock windows when dragging** enables the user to paste windows when moving them or changing their borders. Hit '**Shift**' to disable this feature.
2. Show window icon on task bar. If the checkbox is selected, the window icon dragged out of the working program window is displayed in task bar of operational system. The checkbox is selected by default.
3. The setting effects only on newly dragged out windows and does not effect on previously dragged out ones.

Tables
Select **Tables** to configure the parameters for handling tables:

1. **Move and delete columns using Drag-and-Drop** enables moving and deleting columns in a table using the drag-and-drop mode.
2. **Use table filters** enables configuration of a filter for each table column in all tables except the Level II Quotes Table, the News Table, the Transaction Pocket, the Quotes History Table and the Quote Changes Table.
3. **Use conditional formatting** sets up the conditional formatting parameters for rows and cells for each column in all tables except the Level II Quotes Table, the News Table, the Transaction Pocket, the Quotes History Table and the Quote Changes Table.

4. **Ask for confirmation when moving and deleting items using Drag-and-Drop** enables the replacement of an instrument in the quotes window and deleting items (user confirmation is required to complete an action).
5. **Smooth row highlighting** enables the smooth fading out of highlighting instead of the standard highlighting of rows when an order is executed in tables such as the Quotes Table, Orders Table and so on.

2.20 Changing the interface language

menu **Settings / Language settings...**

To change the interface language, proceed as follows:

1. Select Settings / Language settings....
2. In the window that opens, select the desired language from the Language list.
3. Click Apply.
4. For the change to take effect, the program must be re-launched.

> **To make the above change operational, this feature should be supported by the local QUIK server.**

2.21 Client and market descriptions

2.21.1 Replacing client codes / futures accounts with their descriptions

QUIK allows for the use of descriptions such as surnames and initials instead client codes or futures account numbers.

This feature is intended for users carrying out trading operations for more than one client account or for the administrators of brokers / sub-brokers monitoring client activities. Replacement codes / futures account numbers are displayed in the order entry box, program tables and filters. For example, P.P. Petrov may be shown instead of client code ‘486/17’.

The descriptions are stored on the user's computer so that the sub-broker may use them as deemed fit without disclosing personal information about QUIK users to the servicing broker.

To use descriptions as a substitute, follow these steps:

1. In the QUIK folder, create the text file **clients.ini** for saving codes and relevant descriptions in the form of strings <client code> = <description> or <client futures account> = <description>.

   Example of a file:

```
[clients_name]
```

```
100=Ivanov A.A.
101=Petrov B.B.
101/2=Smirnov B.B.
```

If Cyrillic characters are used in the file, they should be encoded using CP-1251.

2. In the **Trade** section under **Settings / General…** activate **Substitute client codes with client names**, click '…' and select the required file with the description of client codes and, then, click **OK**.
3. For the changes to take effect, the program must be re-launched.

> **The forward slash ('/') cannot be used in client descriptions.**

2.21.2 Grouping instrument classes into securities markets

Global market filter in **Program / Toolbars** under **Settings / General** are used to group instrument classes with the same trading or settlement rules into 'markets'. This feature facilitates filtering opened and newly created tables by classes of instruments.

To enable this feature, follow the steps below:

1. In the QUIK folder, create the text file **markets.ini** with a description of the markets.

   Example of a file:

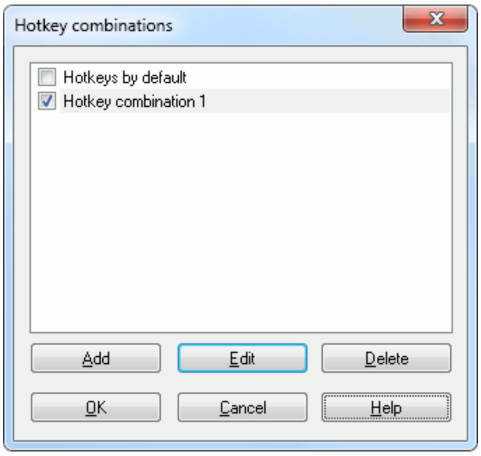
```
[markets]
MOEX corporate shares and bonds = TQBR,TQBS,TQNB,TQNE,TQNL
MOEX corporate NTM and REPO = PSNO,PSAU,PSOB,PSNE
FORTS = SPBFUT,SPBOPT
```

2. In the **Trade** section under **Settings / General,** click '…' to the right of **Market settings file** option and select the required file with the description of the markets and, then, click '**OK'.**
3. For the changes to take effect, the program must be re-launched.

2.22 Hotkey editor

menu **Settings / Hotkey editor…**

Use the **Hotkey Editor** to make changes to hotkey combinations used to launch program functions. QUIK allows the user to define sets of instructions. The original settings can be restored at any time by selecting the default hotkey settings. To open the **Hotkey combinations** window, hit 'Ctrl+H'.



2.22.1 Hotkey combinations

QUIK offers a range of default hotkey combinations, which are listed in sub-section 2.23.3. The default shortcuts cannot be edited. To view the default settings, select the relevant checkboxes by double clicking on them.

To change a hotkey combination, the user should first create a set of hotkeys.

The buttons at the bottom of the window are used to perform actions related to keyboard shortcuts as follows:

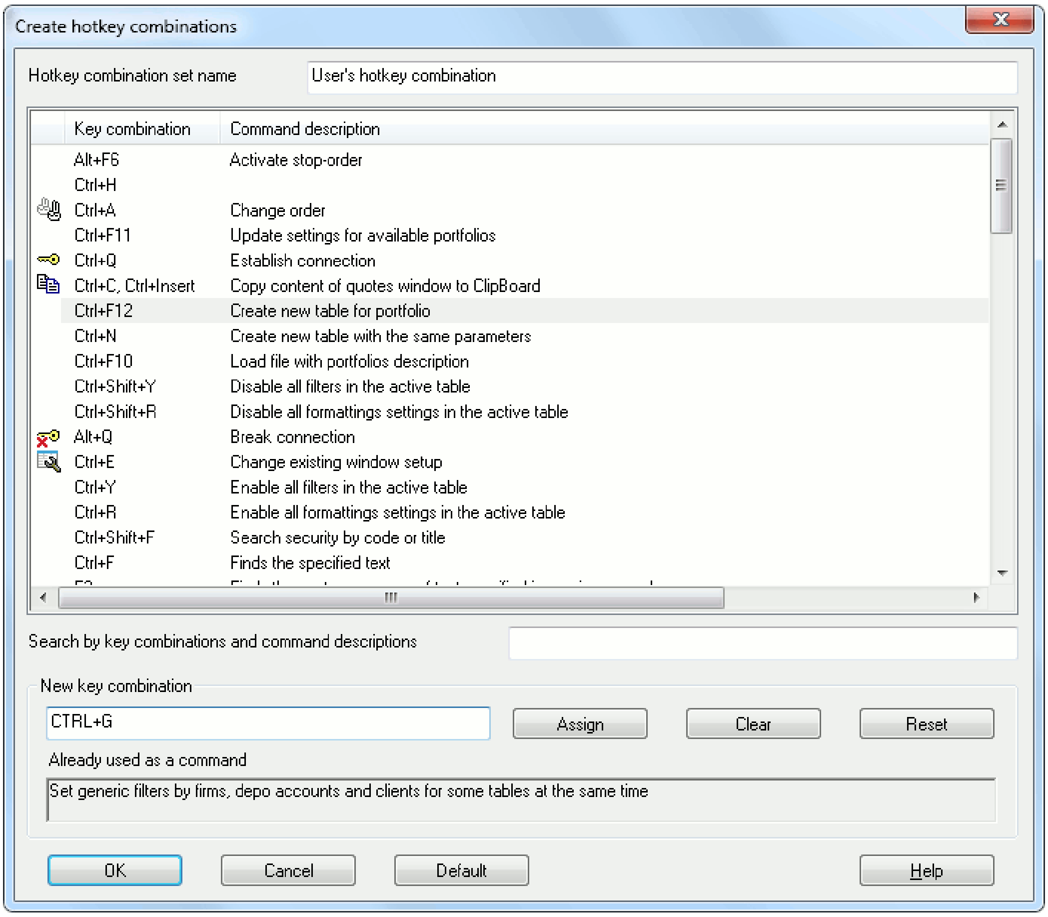
- **Add** – to create a new hotkey combination based on those selected from the list. The user does not need to select combinations that remain unchanged;
- **Edit** allows the user to make changes to the selected set of hotkeys;
- **Delete** allows the user to delete the selected set of hotkeys;
- **OK** – to submit the changes and closes the window;
- **Cancel** – to close the window without saving any changes;
- **Help** provides guidance related to the selected function.

The combinations of hotkeys selected for use is marked with ☑. Click **OK** to replace all hotkey combinations with those from the user-defined set.

2.22.2 Editing a hotkey

Click **Edit** in the **Hotkey combinations** box to launch the hotkey editing window.

This window contains the following options:



1. **Hotkey combination set name** changes the name of a hotkey combination.
2. Hotkey combinations table shows the list of hotkey combinations used, and includes the following columns:

Icon shows the toolbar button that corresponds to the specific action.

Key combination shows the assigned key combination that launches the specific action.

Command description is the text description of the specific action.

3. **Search by key combinations and command descriptions** – allows the user to find a key combination or a description containing the entered string from the list of keyboard shortcuts. Matching strings will be shown at the top of the list.
4. **New key combination** is used to enter a key combination for an action selected from the list. To enter a key combination, move the cursor to the relevant area and click the specified new combination. The buttons located on the right are used to perform the following actions with the entered combination of keys:

   - **Assign** replaces a key combination with the keys specified;
   - **Clear** removes a key combination from the input box;
   - **Reset** cancels a shortcut key combination set for a specific function.

5. **Already used as a command** describes the action to which the current combination is assigned. If this box is not empty, assigning a key combination is forbidden.

Upon completion of editing the list of hotkeys, click **OK** for the changes to take effect. Click **Cancel** to close the window without saving any changes. To clear all changes and restore the standard settings, click **Default**.

2.23 APPENDIX

2.23.1 Functions of Control Panel items

Panel	Item	Function
Standard		Connect to the server
		Disconnect from the server
		Open the configuration window for a graph
		Open the configuration window for a bond yield graph
		Open the configuration window for a Quotes Table
		Open the configuration window for a Transactions Table
		Edit the current window
		Configure the DDE export from the selected table
		Configure the ODBC export from the selected table
		Show Messages Window
		Execute a transaction using the common method
		Open the new order window
		Cancel an unprocessed order
		Replace an unprocessed order
		Open a window to enter a contingent order
Personal tables		Create a trades table
		Create an orders table
		Create a stop-orders table
		Create a cash limits table
		Create a securities limits table

Panel	Item	Function
		Create a client portfolio table
		Create an “Account state” table
Instrument search		Find instruments using a specified sub-string included in their names or codes
		Search sub-string entry box
Global client filter		Reset filter settings
		Enter the client code from the filter in the order forms
	<Not chosen>	Filter all tables by **Client code**
Global market filter		Reset filter settings
	EQBR	Filter tables by **Selected Classes**
Graph		Open the new order window
		Add a graph to the current window / plot
	M5	Modify an interval
		Adjust the graph size to that of the window
		Increase the scale of the graph horizontally
		Decrease the scale of the graph horizontally
		Drag a graph using the mouse
		Draw a trend line
		Draw a horizontal line
		Draw a vertical line
		Draw the Fibonacci Arcs
		Draw the channels
		Draw the Fibonacci Fan
		Draw the Fibonacci Correction Levels
		Draw the Fibonacci Time Zones
		Draw the line speed
		Show AutoChartist data
Message window		Delete all records in the Messages Window

Panel	Item	Function
		Jump to the first message
		Go to the previous message
		Go to the next message
		Jump to the last message

2.23.2 Functions of the program menu items

Menu section	Menu item	Function
Connection	Connect	Start a new session with the server
	Disconnect	End the current session with the server
	Available connections...	View and edit the server connection settings
	Available securities...	Configure the lists of received securities and their parameters
	Request data for anonymous trades...	Request information about anonymous trades for a selected group of instruments
	Receiving files...	Manually select files to be received from the server
	Update program version	Update the program version automatically
	Information window...	Configure the window showing information about the status of the server connection
	Reorder data	Clear the received data and request it again
	Clear all and start a new session	Clear all stored data and request it again
	Reorder graphs archive	Clear the graphs stored in the archives and request the data from the server again
	Exit	Quit the program
Data export	Technical analysis data...	Configure the export settings of data for technical analysis
	Charts	Draw a new chart
	DDE export...	Configure DDE export

Menu section	Menu item	Function
	ODBC export…	Configure ODBC export
	Start DDE export from tables	Start DDE export from all tables
	Stop DDE export from tables	Stop DDE export from all tables
	Start ODBC export from tables	Start ODBC export from all tables
	ODBC export of instruments	Start ODBC export of the best quotes for selected instruments without creating a Level II Quotes Table
	Save to file	Save data from the tables selected in the sub-menu to a file
Tables	Quotes…	Create a new Quotes Table
	Quotes History…	Create a Quotes History table
	Quotes Changes…	Create a Quote Changes Table
	Time and Sales…	Create a Time and Sales Table
	Portfolios	Contains the following sub-menu:
	_ Load portfolio…	Load a portfolio from a file
	_ Available portfolios…	Open the list of portfolios available for creating tables
	_ View portfolio…	Create a table based on a portfolio
	Edit…	Edit the selected table
	Copy	Copy data from the active table to the Clipboard
	Make a copy	Create a table with settings similar to those for the active table
	Adjust columns width	Set the column width to match the width of the data
	Sort by…	Sort the current table by a selected column
	Filter	Contains the following sub-menu:
	_ Disable all	Disable all custom filters
	_ Enable all	Enable all custom filters
	_ Clear all	Clear all conditions set for custom filters

Menu section	Menu item	Function
	Formatting	Contains the following sub-menu:
	_ Disable all	Disable conditional formatting
	_ Enable all	Enable conditional formatting
	_ Clear all	Clear all conditional formatting
	Find...	Find the specified value in the table
	Find next	Continue the search in the current table with the specified value
	Print...	Print the active table
	Print preview	Preview the print layout
	Print settings...	Select and set up a printer
Dealer	Cash positions...	Create a new cash positions table
	Current positions for securities...	Create a new table of current positions for securities
	Current positions for accounts...	Create a new table of current positions for accounts
	Information on depository accounts...	Create a new table of current positions for instruments for selected accounts
	Confirm / reject a client transaction...	Confirm or reject a client's request for the execution of an order
Trading	Account state	Create an “Account state” table
	Level II Quotes	Contains the following sub-menu:
	_ Create...	Create a new Level II Quotes Table (DOM)
	_ Save window settings as template ...	Add the active table's settings to the list of templates
	_ Level II Quotes window templates...	Show the list of templates for the Level II Quotes Tables
	United Level II Quotes	Contains the following sub-menu:
	_ Create...	Create a new United Level II Quotes Table
	_ Save window settings as template ...	Add the active table's settings to the list of templates for United Level II Quotes Tables

Menu section	Menu item		Function
		_ Level II Quotes window templates...	Show the list of templates for United Level II Quotes Tables
	Trades...		Create a new Trades Table
	Orders...		Create a new Orders Table
	Stop orders...		Create a new Stop Orders Table
	Transactions Table...		Create a new Transactions Table
	Market maker liabilities...		Contains the following sub-menu:
		_ By stock and foreign exchange markets...	Create a new table of market maker liabilities for stock and foreign exchange markets
		_ By derivatives market...	Create a new table of market maker liabilities for derivatives market
	NDM		Contains the following sub-menu:
		_ Negdeal orders...	Create a new Table of negotiated deal orders for off-exchange trades
		_ Quotes...	Create a new Table of quotes for off-exchange trades
		_ NDM Level II Quotes...	Create a new Level II Quotes Table (DOM) for Negotiated Deals Mode
		_ Trades for execution...	Create a new table for trades to be executed
		_ Reports on trades for execution...	Create a new table of reports on trades to be executed
		_ Information on settlement codes...	Create a new table of settlement codes for a selected instrument
	CCP		Contains the following sub-menu:
		_ Asset liabilities and claims...	Create a new table of liabilities and claims on assets
		_ Cash liabilities and claims ...	Create a new table of cash liabilities and claims
		_ Interest risks parameters...	Create a new table of interest risks parameters

Menu section	Menu item	Function
	_ Market risks parameters...	Create a new table of market risks parameters
	Participants information...	Create a new table of trading participants
	Futures	Contains the following sub-menu:
	_ Client account limits...	Create a new table of limits on client accounts
	_ Client account positions...	Create a new table of client account positions
	Options	Contains the following sub-menu:
	_ Options board...	Create a new Options Board Table
	_ Set options parameters...	Open a new window to calculate an estimated premium for options
	_ Options information...	Create a new table of options parameters
	Transactions...	Execute a transaction using the common method
	Import transactions from file...	Configure the settings for importing transactions from a file
	External transactions...	Configure the settings for importing transactions via API
	Client transactions...	Create a new table of client requests for the execution of orders
	Cancel orders by condition...	Withdraw active orders that meet specific criteria
	Transactions pocket	Contains the following sub-menu:
	_ Create a pocket...	Create a new Transactions Pocket Table
	_ Put into pocket...	Manually enter a new transaction into the Transactions Pocket
	_ Change in pocket...	Edit a transaction in the Transactions Pocket Table
	_ Put into pocket from file	Contains the following sub-menu:
	_ Orders...	Add transactions from a text file of orders to the table

Menu section	Menu item	Function
	_ Stop orders…	Add stop order transactions to the table from a text file
	_ Quotes…	Add non-specific order transactions to the table from a text file
	_ Negotiated deal orders…	Add negotiated order transactions to the table from a text file
	_ Transactions…	Add transactions to the table from a text file
	_ Save to tri-file…	Save a Transactions Pocket Table to a tri-file
	_ Remove from pocket	Delete a transaction from the transactions pocket
	_ Clear pocket	Delete all transactions from the transactions pocket
	_ Take from pocket	Send a selected transaction to the trading system
	_ Take all from pocket	Send all transactions from the table to the trading system
	Accounts settings…	Select active DEPO accounts and customise the queue in the list
	Price range…	Customise checking the order price for a specified range
	Global filters…	Customise global filters for all tables or tables on an active tab
News	View…	Create a news table
	Save news from table to file	Save news items from a table to a text file using active filters
	Save all news to file	Save all news items from table to a file regardless of active filters
Limits	Cash limits…	Create a new limits table for cash assets
	Limits for securities…	Create a new limits table for securities
	Client portfolio…	Create a new client portfolio table

Menu section	Menu item	Function
	Report on limits…	Generate a report on the limits specified for a particular user for a specific day
	Set limit for cash…	Specify an opening balance and cash limit values for a client
	Set limit for securities…	Specify an opening balance and limit for securities for a client
	Load limits from file…	Load the values for an opening balance and limit for cash and securities from a file
	Save limits to file…	Save the current values for the balance and limits from the Limits Tables for cash and securities to a file
	Trade-sensitive adjustment of limits…	Configure the dynamic correction mechanism for client limits with reference to trades (if the commission is calculated by an external program)
	Load limit corrections from file	Configure the mechanism of dynamic correction of client limits via an external program
	Load limits for derivatives market to file	Save to a file the current values of the positions and limits from the Client Account Limits Table and Client Account Positions Table
	Load limits for derivatives market from file…	Load the opening positions and limits for the Client Account Limits Table and Client Account Positions Table from a file
	Delete all limits for cash…	Delete all values from the Cash Limits Table
	Delete all limits for securities…	Delete all values from Securities Limits Table
	Delete limit for cash	Delete the limit for a particular client from the Cash Limits Table
	Delete limit for securities	Delete the limit for a particular client from the Securities Limits Table
	Client operations report…	Save a client operations report to a file
Messages	System messages	Contains the following sub-menu:

Menu section	Menu item	Function
	_ Messages table…	Create a new table of system messages
	_ Show	Show the Messages window
	_ Hide	Hide the Messages window
	_ Clear	Delete all messages in the Messages window
	Trader messages	Contains the following sub-menu:
	_ Trader messages window…	Create a new table of trader messages
	_ Send a message to trader…	Create and send a new message
	_ Save trader messages from table to file…	Save all messages shown in the Trader Messages Table using the specific filter settings to a text file
	_ Save all trader messages to file …	Save all messages shown in the Trader Messages Table disregarding filter settings to a text file
	_ Mark all messages as read	Mark all messages in the Trader Messages Table as 'received'
	_ Delete trader messages	Delete all messages from the Trader Messages Table
	Alerts	Contains the following sub-menu:
	_ Alerts window…	Create an alerts window
	_ Create alert	Contains the following sub-menu:
	_ For order…	Create an alert notification for the execution / cancellation of an order
	_ For stop order…	Create an alert notification for the execution / cancellation of a stop order
	_ For change in the Quotes Table…	Create an alert notification based on changes to the Quotes Table
	_ Options (price / premium)	Create a notification based on the ratio between option prices and the estimated premium
	_ For spot limits…	Create a notification for spot market limits

Menu section	Menu item	Function
	_ For futures limits…	Create a notification based on the positions and limits on the derivatives market
	_ Modify alert…	Change the settings for an alert notification
	_ Cancel alert	Cancel an alert notification
	_ Request report…	Create a report on SMS alerts
	_ Settings…	Customise the SMS alert service (specify telephone numbers to which send alerts and enable / disable certain types of alerts)
Settings	General…	Customise the program interface and parameters for receiving messages and order entries
	Internet connection…	Configure the connection via a proxy server
	Language settings…	Select the interface language
	Hotkey editor…	Define hotkey combinations for the prompt launch of program functions
	Save windows configuration to file…	Save the table settings to a file
	Load windows configuration from file…	Read table settings from a file
	Restore default windows configuration	Restore default table settings
Windows	Cascade	Arrange windows in a stack one over another
	Tile Horizontally	Arrange windows in columns horizontally
	Tile Vertically	Arrange windows in rows vertically
	Arrange icons	Arrange minimised windows at the bottom of the screen as icons
	Close all	Close all windows
	Minimise all	Minimise all windows
	Restore all	Expand all minimised windows
	Setting tabs…	Configure tabs
	Hide tabs	Hide all tabs
	Move window to a tab	Move the active window to a tab

Menu section	Menu item	Function
	Dock window	Lock the size and location of all windows in the active tab
Help	Contents	View reference information about using the program
	Version components and plugins…	View information about the components and plugins used in the current version
	About …	View information about the authors and the current version

2.23.3 List of Shortcut keys

Group	Combination	Function
General	'F1'	Launch the program help menu
	'F3'	Continue search
	'F4'	Create a Level II Quotes Table
	'F5'	Update the table
	'Alt+1'…'Alt+9'	Switch to tab number 1 … 9
	'Alt+Q'	Disconnect from the server
	'Ctrl+B'	Customise the tabs
	'Ctrl+L'	Lock the size and location of all windows in the active tab
	'Ctrl+C' or 'Ctrl+Insert'	Copy a table to Clipboard
	'Ctrl+E'	Edit a table or a chart
	'Ctrl+F'	Start a search
	'Ctrl+G'	Customise the global filters
	'Ctrl+H'	Customise the list of hotkeys
	'Ctrl+L'	Configure DDE export
	'Ctrl+N'	Copy a table
	'Ctrl+O'	Configure ODBC export
	'Ctrl+P'	Print a table
	'Ctrl+Q'	Connect to the server

Group	Combination	Function
	'Ctrl+T'	Common method of executing a transaction
	'Ctrl+W'	Adjust the column width
	'Ctrl+F4'	Close the active window
	'Ctrl+F6' or 'Ctrl+Tab'	Switch to the next window
	'Ctrl+F10'	Load a portfolio locally
	'Ctrl+F11'	Select available portfolios
	'Ctrl+F12'	Create a portfolio table
	'Shift+Ctrl+F6' or 'Shift+Ctrl+Tab'	Switch to the previous window
	'Shift+Ctrl+L'	Start DDE export for all tables with the specific export settings
	'Shift+Ctrl+O'	Start ODBC export for all tables with the specific export settings
	'Shift+Ctrl+S'	Stop the DDE export for all tables
	'Ctrl+Shift+Y'	Disable all user-defined filters
	'Ctrl+Y'	Enable all user-defined filters
	'Alt+Y'	Clear all user-defined filters
	'Ctrl+Shift+R'	Disable conditional formatting
	'Ctrl+R'	Enable conditional formatting
	'Alt+R'	Clear all conditional formatting
	'Ctrl+Shift+F'	Open a dialogue box to search for an instrument by its code or name
Handling orders	'F2'	Create an order
	'F6'	Create a new stop order
	'Alt+F2'	Show / hide the order entry toolbar
	'Alt+F6'	Activate a stop order
	'Ctrl+F2'	New combined order
	'Ctrl+F8'	Withdraw all active orders from an active Level II Quotes window
	'Ctrl+A'	Replace an order
	'Ctrl+D'	Cancel an order

Group	Combination	Function
	‘Ctrl+Z’	Withdraw all active bids from an active Level II Quotes window
	‘Ctrl+X’	Withdraw all active offers from an active Level II Quotes window
	‘Ctrl+1’	Place a limit order to buy (bid) at a fixed price and quantity
	‘Ctrl+2’	Place a market order to buy (bid) at a fixed price and quantity
	‘Ctrl+3’	Place a limit order to sell (offer) at a fixed price and quantity
	‘Ctrl+4’	Place a market order to sell (offer) at a fixed price and quantity
	‘Shift+F6’	Transfer a stop order entered on another server to the current QUIK server
	‘Shift+Alt+D’	Cancel orders if a condition is met
Order entry window	grey ‘+’	Increase the order price by one point
	grey ‘-‘	Reduce the order price by one point
	‘Ctrl+grey ‘+’	Increase the order price by 10 points
	‘Ctrl’+ grey ‘-‘	Reduce the order price by 10 points
	‘PageUp	Increase the number of lots in an order by one
	‘PageDown’	Reduce the number of lots in an order by one
	‘Ctrl’+PageUp’	Increase the number of lots in an order by 10
	‘Ctrl+PageDown’	Reduce the number of lots in an order by 10
	<space>	Reverse the order direction (requires configuration)
	‘Tab’	Switch to the next order form box
	‘Shift+Tab’	Switch to the previous order form box
	‘Enter’	Send an order
	‘Esc’	Close the window without sending an order
	‘K’	Add 3 digits (000) to a non-zero value in the field of the price, quantity or volume
	‘T’	Add 3 digits (000) to a non-zero value in the field of the price, quantity or volume
	‘M’	Add 6 digits (000000) to a non-zero value in the field of the price, quantity or volume
	‘B’	Add 9 digits (000000000) to a non-zero value in the field of the price, quantity or volume

Group	Combination	Function
	'Y'	Add 9 digits (000000000) to a non-zero value in the field of the price, quantity or volume
Level II Quotes window	'Alt+W'	Show a table row in the middle of the window with the price equal to the average value between the highest bid and the best offer. Valid only if the **Sparse Level II** mode is enabled.
Level II Quotes window toolbar	'Alt+Z'	Take the price offset value from 'Offset 1' specified in the settings for the active window. For a description of the method used, see Section 5, sub-section 5.7.6
	'Alt+X'	Take the price offset value from 'Offset 2' specified in the settings for the active window
	'Alt+C'	Take the price offset value from 'Offset 3' specified in the settings for the current window
	'Alt+V'	Take the price offset value from 'Offset 4' specified in the settings for the current window
	'Alt+A'	Take the quantity of the securities from 'Quantity' in the selected row. If the **Quick order sending / cancellation** is enabled, the quantity of securities should be taken from 'Total amount for the best'. For a description of the method used, see Section 5, sub-section 5.7.1
	'Alt+S'	Take the quantity of securities from 'Volume 1' specified in the settings for the current window
	'Alt+D'	Take the quantity of securities from 'Volume 2' specified in the settings for the active window
	'Alt+F'	Take the quantity of securities from 'Volume 3' specified in the settings for the active window
Account state window	'Ctrl'+'K'	Close a position
	'Ctrl'+'I'	Reverse a position
	'Ctrl'+'Shift'+'K'	Close all positions
Quotes table	'Alt'+'I'	Open the window of information on the instrument

2.23.4 Program settings

Menu item	Purpose	Description
General... / Program	Program interface settings	2.19.1

Menu item	Purpose	Description
General ... / Program / Toolbars	Viewing toolbars	2.1.2, 2.1.5
General ... / Program / Receiving Data	Settings for receipt of data from the server	1.5.1
General ... / Program / Saving Data	Settings for saving data	1.5.2
General ... / Program / Configuration files	Management of the configuration files	2.15
General ... / Program / Context menu	Context menu settings	2.18.1
General ... / Program / Data Export	Settings for the export of data to Microsoft Excel	6.1.3
General ... / Program / Clipboard	Configuration of saving data to Windows Clipboard	2.6.2
General ... / Program / Fonts	Configuration of the fonts used in the descriptions and dialogue boxes	2.6.9
General ... / Program / Sounds	Sound settings	2.18.1
General ... / Program / Encryption	Data encryption settings	1.10.1
General ... / News	News parameters	2.18.2
General ... / Trading	Trading operations parameters	5.2.11
General ... / Trading / Orders	Order entry box settings	5.2.11
General ... / Trading / Orders / Entry forms	Entry forms settings	5.2.11
General... / Trading / Orders / Client orders	Configuration for the client order receipt mode with confirmation from the broker	7.36.2
General ... / Trading / Orders / Algo orders	Configuration of 'volatile' algorithmic orders	User's manual "Algorithmic orders" sub-section 8.2
General ... / Trading / Orders / OMS orders	Viewing client codes on the OMS order form	User's manual "OMS Manager Module", sub-section 22
General ... / Trading / Orders / Negdeal orders	Negotiated deal orders parameters	5.2.11

Menu item	Purpose	Description
General ... / Trading / Closing positions	Closing positions settings	5.2.11
General ... / Trading / Client portfolio	Client portfolio settings	5.2.11
General ... / Trading / Level II Quotes	Level II Quotes parameters settings	5.2.11
General ... / Trading / United Level II Quotes	United Level II Quotes parameters settings	5.2.11
General ... / Trading / Currency unit	Selecting the currency unit	2.18.3
General ... / Trading / Digital signature	Digital signature parameters	5.2.11
General ... / Messages	Messages and message alert settings	2.17.2
General ... / Messages / Trader messages	Trader messages settings	3.8.4
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