



Messaging module

Chats

User's manual

Version 1.15



Contents

1. General information	3
1.1 Purpose.....	3
1.2 Features.....	3
1.3 Main windows and menu items.....	3
2. Chat window.....	4
2.1 List of contacts.....	4
2.1.1 Chats tab	5
2.1.2 Contacts tab	6
2.2 Chat room	7
2.2.1 Available functions.....	10
3. Group chat	10
4. Send text messages in bulk	12
5. Sending messages.....	14
6. Sending files.....	15

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1. General information

1.1 Purpose

The **Messaging module** (the Module) is intended for the organization of communication among users of QUIK workstation.

1.2 Features

- Messaging with other users / groups.
- Messaging with users / groups of other organizations.
- Messaging with selected users by group chats.
- Search for messages, file names, contacts, groups, organizations, chats.
- View the chat history.
- View the user info or members info.
- Saving the chat to a file.
- Send text messages in bulk.
- Send files of the arbitrary format in any chat.

1.3 Main windows and menu items

The Module functions are accessed through the main menu of QUIK workstation.

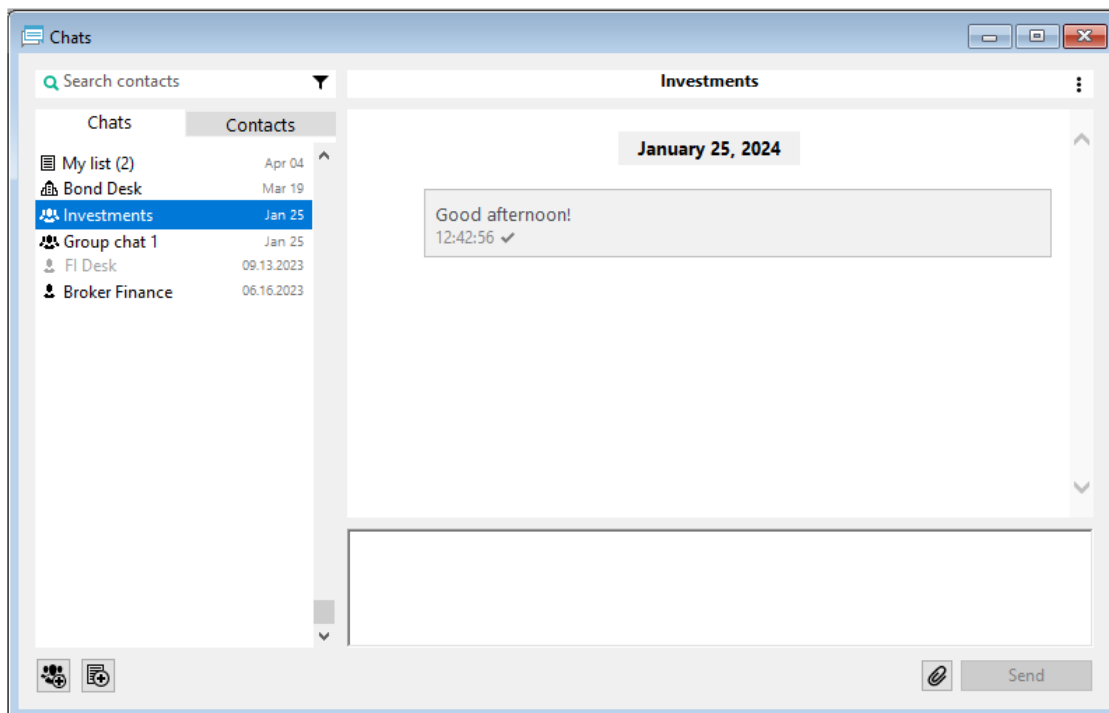
To open the chat window for chatting with order users or groups, use:

- The [Chats](#) command on the **Plug-in** menu. The command name is set by the organization. By default, it is Chats.
- The  button on the **Chats** toolbar.
- The **F11** hotkey.
- The right-click on the field (call the shortcut menu) in the **NDM Level II Quotes table**.



2. Chat window

menu **Plugins / Chats** (or )



The size of the chat window is adjusted by capturing the window borders with the cursor and enlarging / diminishing it to the desired size.

2.1 List of contacts

The left part of the window contains the list of chats and contacts of the user. The following parameters are available here:

-  **Search contacts** – search for a user, group, group chat, broadcast by entered value in the box. When using search, found contacts or chats are displayed in tabs.

Found contacts are shown in categories: the **My contacts** (who you have already chatted with) and the **Global search** (who you have not chatted with). The **Global search** is displayed only when you use the search filter. When searching, deleted users are not displayed.

Clicking the  icon opens the window with search settings to filter results:

- Full name / Chat or broadcast name (for Chats tab) / Full name (for Contacts tab);
- Group;
- Organization.



All settings are enabled by default, if the filter settings have been changed by the user, a dot appears next to the  icon. At least one setting has to be enabled. Closing the chat window resets the search settings.

2.1.1 Chats tab

The list of the user chats contains the following information:

1. The **Broadcast lists** are always displayed first in the **Chats** tab. The **Broadcast** is used to send text messages in bulk.

The **Broadcast list** marked by the  icon. The number of contact included in the list is displayed in the brackets next to the name of the **Broadcast**. For example, **My list (10)**.

Click the  button in the lower left part of the window to create the **Broadcast list**.

The shortcut menu is available for broadcast lists. It is displayed when you right-click on the broadcast name. The following functions are available:

-  **Edit broadcast** – edit broadcast list. Contact list or broadcast name can be changed by the **Edit broadcast** function;
-  **Delete broadcast** – delete broadcast list.

2. The list of users who you have already chatted with.

Users are marked by the  icon, groups are marked by the  icon. User info is in the dialog box. It is required to click on the  button at the top right of the dialog box to see information about user. Select the  **User information** from the list.

If a contact was deleted, its name becomes greyed. Messaging with them is not available while the chat history is kept. Also, a deleted contact is a user who no longer has sufficient permissions (no permissions for user/user chats, group/group chats, group chats) for chatting.

3. The list of groups who you have already chatted with. The groups are marked by the  icon. Members info is in the dialog box. It is required to click on the  button at the top right of the dialog box to see information about members of the group chat. Select the  **Members info** from the list.

This chat type is available if you have the specific permissions.

4. **Groups chat** is used for chatting with arbitrary members. It is available when the **Chat with users** and the **Inter-broker chats** permissions are enabled. Members can be users of the different organizations.



Member of the group chat can be only user type contact.

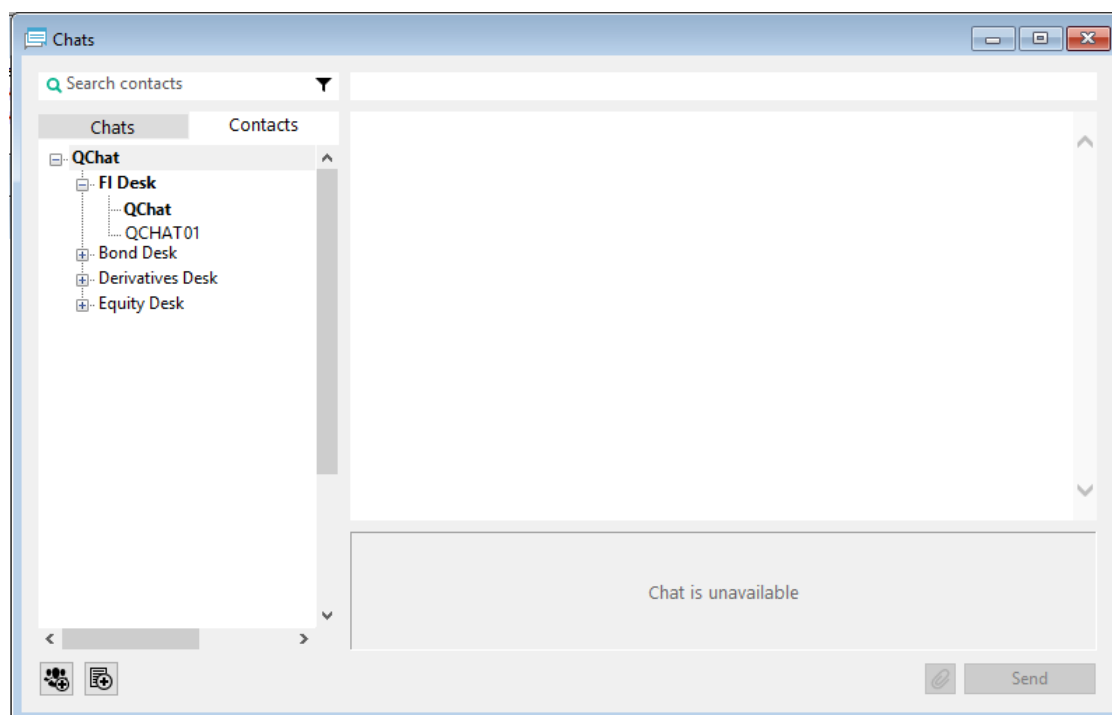
Click the  button in the lower left part of the window to create group chat.

Only the creator (administrator) can edit and delete group chat. Shortcut menu is available for chat administrator when right-clicking to group chat name. The following functions are available:

-  **Chat settings** – edit group chat. Group chat name can be changed;
-  **Delete chat** – delete chat. Chat is deleted for all users, messages history is unavailable.

The list of contacts is sorted by the time of the last message (the most recent ones listed first). The time of the last sent message is displayed next to the chat in the following format: time, day, day of week, <DD MMM> or <DD.MM.YY>. If there are unread messages, their number is displayed next to the contact name, for example: 20.

2.1.2 Contacts tab



The elements in the list are displayed according to user permissions:

1. Organization or organizations, list of groups of the organizations and users, if the user has Inter-broker chats permissions.
2. List of groups of the own organization and users, if the user has no Inter-broker chats permissions.

3. List of groups, without list of users, if the user has no permissions for the user/user chats, but has permissions for the group/group chats.
4. List of groups and users within these groups, if the user has no permissions for the group/group chats, but has permissions for the user/user chats. The messages can be sent only to users, not to groups.

Available functions

1. Pressing the group name redirects to the correspondence history with this group.
2. Clicking the  icon next to the organization name displays the sub-listed items of organization groups. Clicking the  icon hides the sub-listed items of organization groups.

If the organization name is unavailable, the My organization name is used by default. The organization, group and name of the user are highlighted in bold.

3. Clicking the  icon next to the group name displays the sub-listed items of its users (if you have appropriate permissions). Clicking the  icon hides the sub-listed items.

If the Contact tab name is highlighted in red, this warns about:

1. **The service is completely unavailable (the service is temporarily unavailable) or partially unavailable (not all organizations are available);**
2. **Other errors.**

For detailed information, contact your broker.

2.2 Chat room

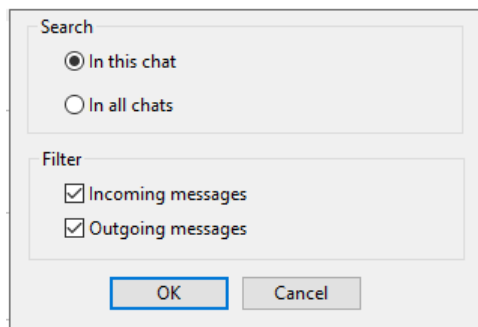
On the right side of the chat window there is a chat room.

The chat room title shows the name of the selected contact and the  icon. Clicking the  icon opens list of functions. The list of available functions varies depending on the used chat type:

1.  **Edit broadcast** – edit the **Broadcast list**. Contact list or broadcast name can be changed by the **Edit broadcast** function. It is available in broadcast chat room.
2.  **Delete broadcast** – delete the **Broadcast list**. It is available in broadcast chat room.
3.  **Search messages** – search for messages and files. Clicking the icon activates the panel for entering a search query. The search query is case insensitive. The file search is performed by their names. It is available in private chat room, chat room with the group (group of own organization or another organization), and group chat room.



- Clicking the ✕ icon clears the search bar.
- Clicking the ⚙ icon opens the window with the search settings for filtering values:



The dialog box is titled 'Search'. It contains two sections: 'Search' and 'Filter'. In the 'Search' section, there are two radio buttons: 'In this chat' (selected) and 'In all chats'. In the 'Filter' section, there are two checked checkboxes: 'Incoming messages' and 'Outgoing messages'. At the bottom, there are 'OK' and 'Cancel' buttons.

- **In this chat** – search within the selected chat. Enabled by default;
- **In all chats** – search in all existing chats;
- **Incoming messages** – search for incoming messages only. Enabled by default;
- **Outgoing messages** – search for outgoing messages only. Enabled by default.

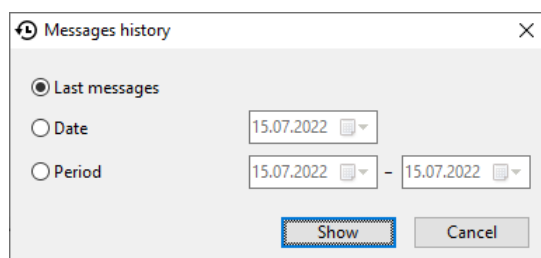
If the **Filter** was changed by the user, a point appears next to the ⚙ icon .

Search displays a list of found messages according to the query. If you search within the current chat, the results are displayed in the window on the right. If you search in all chats, the results are displayed in the window on the left. If the list of matches is too large for the entered search characters, it is recommended to specify a more exact/complete search query.

- Clicking the ✕ icon ends the message search. Another way to exit the message search mode is to open the **Contacts** tab.

Clicking the **Open chat** in the right bottom part of the found message window opens the chat with the contact for the day when the message was sent. Clicking the ⬅ icon returns to the message search mode.

4. 🕒 **Messages history** – time settings of messages history for a certain period. It is available in private chat room, chat room with the group (group of own organization or another organization), and group chat room. Clicking the icon opens the window with following parameters:



The dialog box is titled 'Messages history'. It contains three radio buttons: 'Last messages' (selected), 'Date', and 'Period'. The 'Date' option has a date picker set to '15.07.2022'. The 'Period' option has two date pickers, both set to '15.07.2022', separated by a minus sign. At the bottom, there are 'Show' and 'Cancel' buttons.

- **Last messages** (by default) shows incoming (current) messages and the latest messages for the period set by the organization.
- **Date** shows message history for the selected date.

- _ **Period** shows message history for the selected period.

To save the settings, click the **Show** button. If the user sends a message to the chat, the filter of date / period will be reset, and the latest messages will be displayed.

5. ⓘ **User information** / ⓘ **Members info** – the name changes depending on chat type.

- _ ⓘ **User information** – display information about contact in private chat room. It is available in private chat room. Clicking the icon opens the window with the following information:
 - _ Name.
 - _ Group.
 - _ Organization.
- _ ⓘ **Members info** – display members list in group chat. It is available in chat room with the group (group of own organization or another organization), and group chat room. Clicking the icon opens the window with the following information:
 - _ **Members (1)** – counter dynamically displays the number of members.
 - _ **Searching members...** – list of the chat members. Double-click on a member opens private chat with this member, if user has permissions for the user/user chats.
 - _ **Change members** – change group membership. The button is available only for group chat creator. To add the contact to member list, do the following:
 - _ Disable the **Selected only** check box;
 - _ Enable the check box next to required contact;
 - _ It is required to disable the check box to remove a contact from the chat list. User consent is not required. Removed user receives the notification about removing and chat is no longer available for contact.

If there were deleted users in the group chat, they will be deleted from this chat automatically.
 - _ Click the **Save** button to save changes in the members list of the selected chat.

6. ⬇️ **Save chat to file** – save chat in the selected file. It is available in private chat room, chat room with the group (group of own organization or another organization) and group chat room.

7. ➡️ **Leave chat** – member leaving the chat. It is available in group chat room.

Function is unavailable for chat administrator (creator).

8.  **Chat settings** – edit group chat. Group chat name can be changed by the **Chat settings** function. It is available for chat administrator in group chat.
9.  **Delete chat** – delete chat. It is available for chat administrator in group chat.

2.2.1 Available functions

By right-clicking on the message, the shortcut menu is displayed with the following available functions:

1.  **Open** – open the file in the application after downloading this file. It is available if you have permission to work with files.
2.  **Show in folder** – open the file in the folder after downloading this file. It is available if you have permission to work with files.
3.  **Save file as...** – save file after specifying the location to save it. It is available if you have permission to work with files.
4.  **Copy selected text** – copy text. It is not active by default. It is necessary to select the text to activate this function.
5.  **Copy message** – copy text of the message. If there is no text in the message, this function is not displayed.
6.  **Select all** – select all text in the chat.
7.  **Message** – open the chat room of the selected contact. It is available in the chat room with the group (group of own organization or another organization), and group chat room.

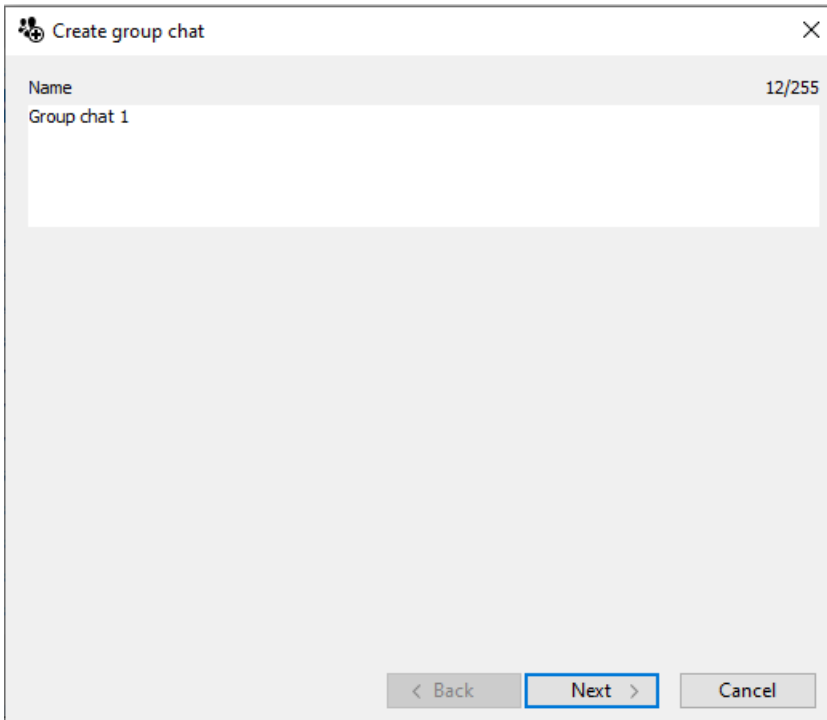
The Message function is unavailable if organization prohibited communication between groups.

3. Group chat

This chat type is available if you have specific permissions.

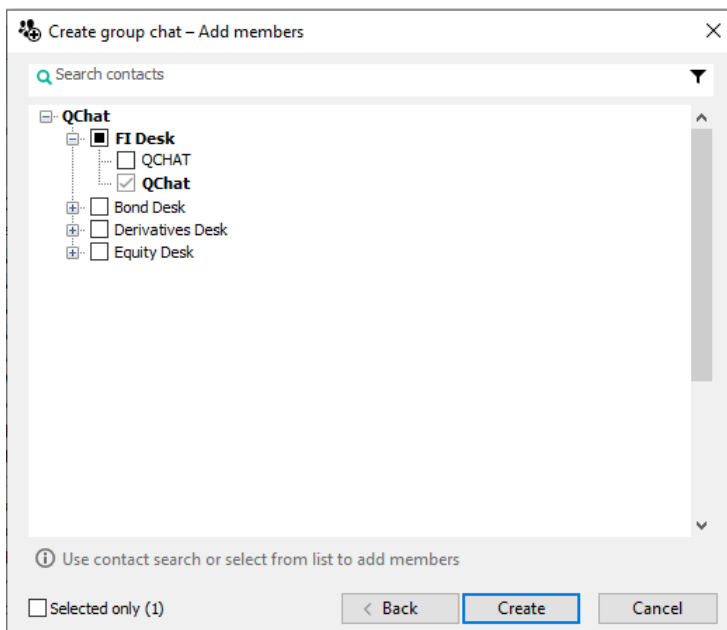


The  **Create group chat** button is used to create group chat. The window with following parameters opens by clicking the button:



The dialog box titled "Create group chat" has a close button (X) in the top right corner. It contains a text input field labeled "Name" with a character count "12/255" on the right. The input field contains the text "Group chat 1". At the bottom, there are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel".

1. **Name** – group chat name. Maximum number of the characters is 255. Value by default: **Group chat**. If some list already has **Group chat** name, the number is added to this name. For example, **Group chat 1**. Numbering is only assigned if a default name is set. The group chats with the same names are available.
2. The window for selecting chat members is displayed by clicking the **Next** button:



The dialog box titled "Create group chat - Add members" has a close button (X) in the top right corner. It features a search bar labeled "Search contacts" with a magnifying glass icon and a dropdown arrow. Below the search bar is a list of contacts under the heading "QChat". The list includes "FI Desk" (checked), "QCHAT" (unchecked), "QChat" (checked), "Bond Desk" (unchecked), "Derivatives Desk" (unchecked), and "Equity Desk" (unchecked). At the bottom, there is a hint: "① Use contact search or select from list to add members". Below the hint is a checkbox labeled "Selected only (1)". At the bottom right, there are three buttons: "< Back", "Create" (highlighted with a blue border), and "Cancel".

-  **Search contacts** – search for a user or group by entered value in the box. The contact check box is required to be enabled for selecting this contact as group chat member.

The window opens with search settings to filter results by clicking the  icon :

- Full name.
- Group.
- Organization.

All settings are enabled by default, and if the filter settings have been changed by the user, a dot is displayed next to the  icon . At least one setting has to be enabled.

- **Contact list** – search by contact list. The contact check box is required to be enabled for selecting this contact as group chat member. The organization, group and name of the user are highlighted in bold and they are always the first on the list.
- **Selected only (1)** – display only selected members. The chat creator is always listed in the number of selected users. The **Search contacts** changes its name to the **Search members** when the check box is enabled.
- **Create** – create group chat.
- **Back** – open previous window.
- **Cancel** – cancel creating group chat.

The user is immediately added to the chat after creation (user consent is not required).

The user receives the notification about being added to the chat. The  [Leave chat](#) function is available for chat member.

If the chat administrator needs to change the member list, inside the group then click on the  icon chat and select the  **Members info** function, then click on the [Change members](#) button.

Only creator of the chat can delete it. To do this, use the  [Delete chat](#) function must be used.

There may be some problems adding new users to the chat. In this case, chat is created and diagnostic that not all users have been added is issued. You can view such users list. When using old version of the QUIK Workstation, the user receives message about possibility to update the program to newer version.

4. Send text messages in bulk

The  button is used to create the **Broadcast list**. The window with the following parameters opens by clicking the button:

Create broadcast list

Name: My list 1

Search contacts

Contacts

- ☐ Bond Desk
- ☐ Qchat
- ☐ Qchat Test
- ☐ Derivatives Desk
- ☐ Equity Desk
- ☐ FI Desk

Selected recipients (0)

Save Cancel

1. **Name** – name of the broadcast list. Maximum number of the characters is 32. Value by default: **My list**. If some list already has **My list** name, the number is added to this name. For example, **My list 1**. Numbering is only assigned if a default name is set.
2.  **Search contact** – search for a user or an organization by entered a value in the box. Found contacts are divided into categories: the **Recipients** (who you have already chatted with and also contacts you have not chatted with from the broadcast list) and the **Global search** (other found contacts). The **Global search** category is displayed only when you use the search filter.

If the contact was found in the Global search category and was not an element of the list at the beginning of creation, then the selected contact with the check box selected on it moves to the Recipients category after any filter changes. And then it is in this category, as if it had been there from the very beginning of editing.

If there is a contact in an existing broadcast list that was added from the **Global search** category, and you have not chatted with this contact, then it is also displayed in the **Recipients** category.

Clicking the  icon opens the window with search settings to filter results:

- Full name.
- Group.
- Organization.

All settings are enabled by default, and if the filter settings have been changed by the user, a dot appears next to the  icon. At least one setting has to be enabled.

3. Contacts. In the process of contact search, found contacts are shown in this area.

Users are marked by the  icon, groups are marked by the  icon.

If the contact was deleted, you cannot add this contact to the **Broadcast**. Deleted contact is displayed only if active contact was added to the **Broadcast** and then this contact was deleted. When you edit the **Broadcast**, you can disable the contact check box, this way you delete this contact from the **Broadcast**.

The list of contacts is sorted by the alphabet.

Enable the check box next to the contact to add this contact to the **Broadcast**. Disable the check box to delete the contact from the **Broadcast**.

4. Selected recipients – only selected contacts with the enabled check box are displayed in the Broadcast list. At the same time, the **Search contacts** will filter only currently selected contacts.

The counter is displayed next to the **Selected recipients** parameter. The counter dynamically displays the number of broadcast list contacts.

There must be at least one contact in the **Broadcast list**.

5. Save – save the **Broadcast list**.

6. Cancel – cancel savings of the **Broadcast**.

5. Sending messages

1. On the **Plugins** menu, select **Chats** (or ).

2. There are several methods to send messages to other users:

- Find a contact on the list in the left part of the window (if the chat already exists) or use the  **Search contact** box, and select it. To narrow your search results, use the filter  in the search box. Selecting a contact opens the chat room.
- Find the required contact in the **Contacts** tab.
- Use a double-click with the left mouse button on a group chat member to open the private chat room, if you have permissions for the user/user chats. Or right-click on the member's message, in the appeared shortcut menu, select the **Message** to open the chat with contact.
- To send a message to chat room with the group:



- _ Select the required group.
- _ To send a message to the [broadcast lists](#):
 - _ Select a broadcast list to send a message to contacts from this list.
- _ To send a message to [group chat](#):
 - _ Select the required group chat.

3. Type your message in the lower part of the chat room. To start a new line, use key combinations: Ctrl+Enter and Shift+Enter. If it is necessary, attach a file by using the  [button](#).

4. To send a message, click **Send** or press **Enter**.

If the broadcast list is used, the sent message will appear in the private chat room with each of the contacts on the **Broadcast list**.

If the message cannot be sent to the broadcast contact, no further attempts are made to send it. Messages are not sent to deleted contacts.

If the group chat is used, the sent message will appear for each member in the group chat.

If a message was delivered, the  icon appears next to it. Clicking on links in messages is available.

Notifications:

- _ At the right bottom part of the screen there is a pop-up notification informing you of an incoming message.

To enable sound notifications about new messages, use the QUIK workstation settings (menu System / Settings / General settings..., section Program / Sounds). For details, see the User's manual of QUIK workstation, Chapter 2, "Basic Operating Principles".

- _ In the left bottom part of the **Chats** (if the message counter is not visible) and **Contacts** tabs, there is a pop-up notification informing you about an incoming message. If you click on the notification, the **Chats** tab is opened automatically. If the search mode was active at the moment of pressing, it is automatically reset.

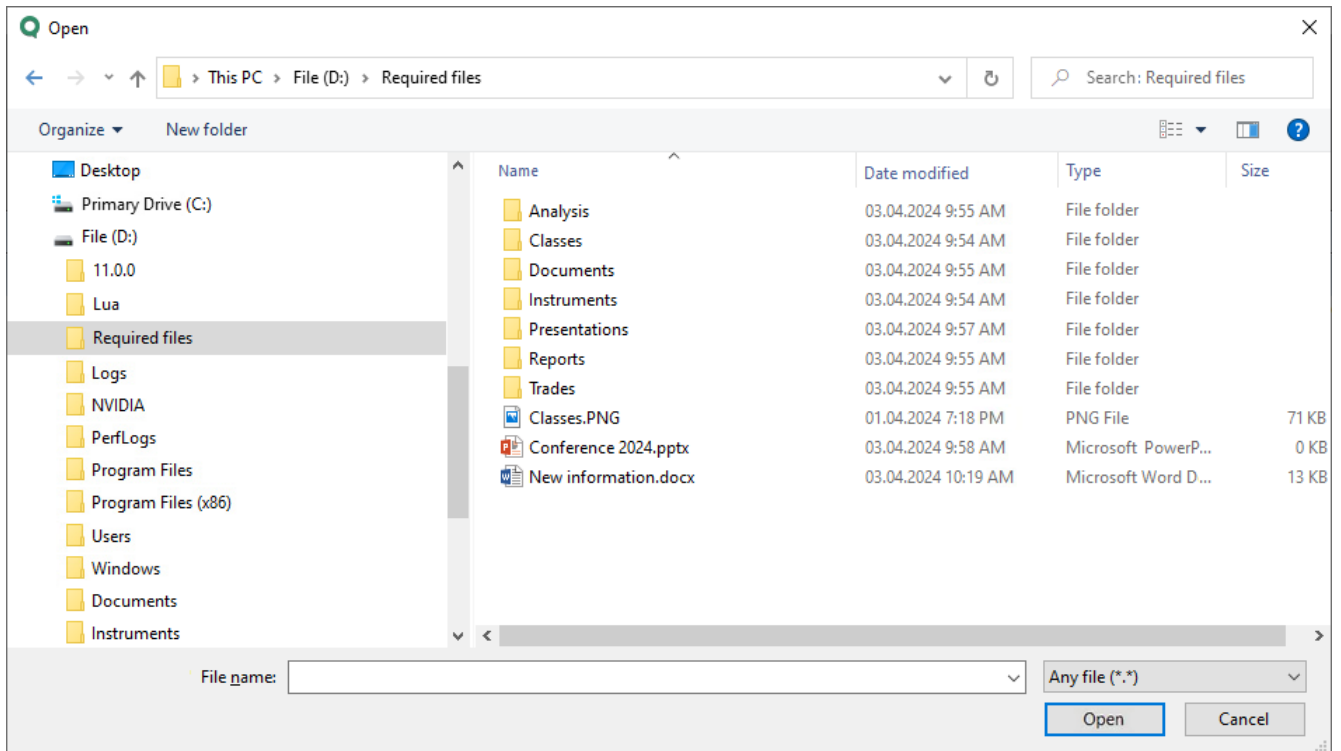
To close the chat window, click  or press **Esc**.

6. Sending files

The  **Attach file** button is used to send files.

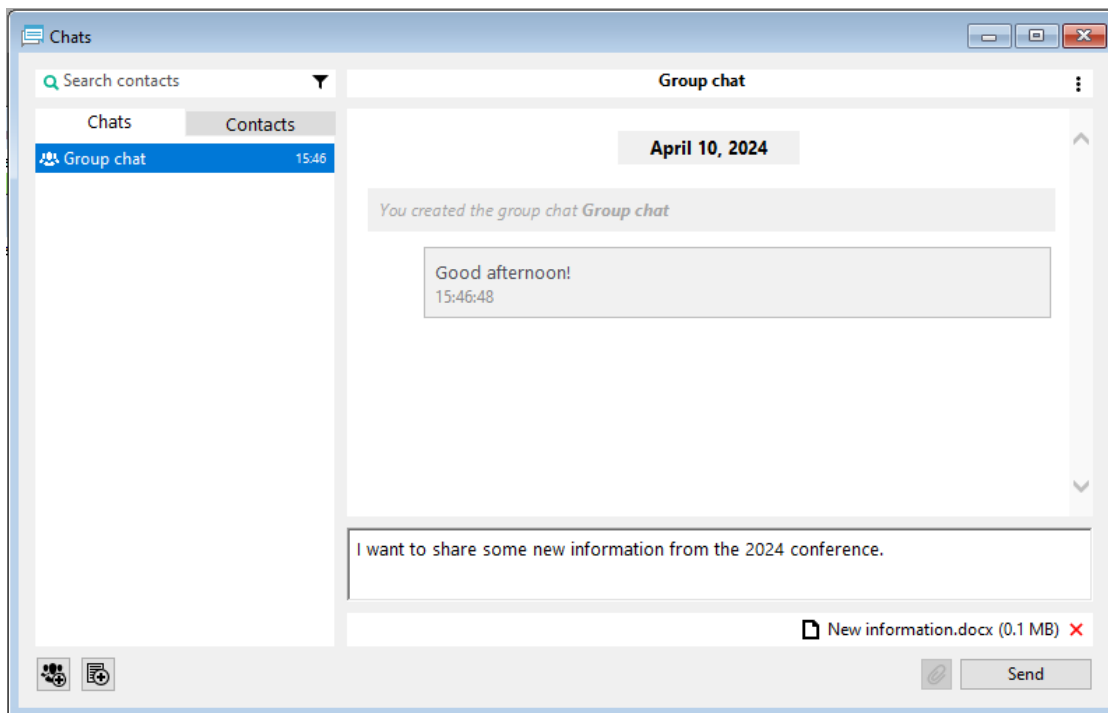
**The organization has permission to prohibit access to files to its users.
The user of this organization will not be able to receive the file, but will be able to know that this user has received a file with unknown content.**

When you click the  button, the **Open** window opens, allowing you to select the required file to send.



Select the file and click on the **Open** button. The file will be attached to the message entry field. In the attached file, its name, type and size are indicated. The default value of the file size: 15 megabytes. The file size is set on the organization side. When sending files between organizations, the file size is determined by setting in the Interbroker messaging module (QChatRouter). A file with a size of 0 bytes does not belong to the sending.

Only one file can be attached.



Available actions with the attached file:

1.  – delete the attached file in the message.
2. **Send** – send message. When you click the **Attach file** and **Send** buttons, they are changed to **Cancel sending**. The button is active while there are the process of the download sending a message with a file. When the message has already been sent, the **Attach file** and **Send** buttons are displayed in their places. Editing message text and deleting attached file during the sending process is not available. Also, in the chat room used for sending, you cannot send a new message. In another chat room, sending messages is available.
3. **Cancel sending** – cancel sending. When you click on the **Cancel sending** button, all elements are returned to their original state: the text can be changed and the file can be deleted.

The chat with a file being sent changes the icon to the . If sending files to several chats is used, then it is done in order of queue.

If an error occurs while sending, the chat with the file being sent changes the icon to the . This icon also appears in the attached file of the chat room used and in the message file with the file. This icon indicates a download error everywhere. To fix the error, try to update file upload.

After sending, all elements return to their original position.

