# RCM Manager

## User Manual

*Version 1.0  (2015-07-07)*

B2BITS  <epam>

## Table of Contents

## Overview

RCM Manager provides capability for changing pre-trade limits on and viewing alert messages received from PTRCM.

## Main Window

When you start RCM Manager, it shows its main window and opens to the Limits mode by default.
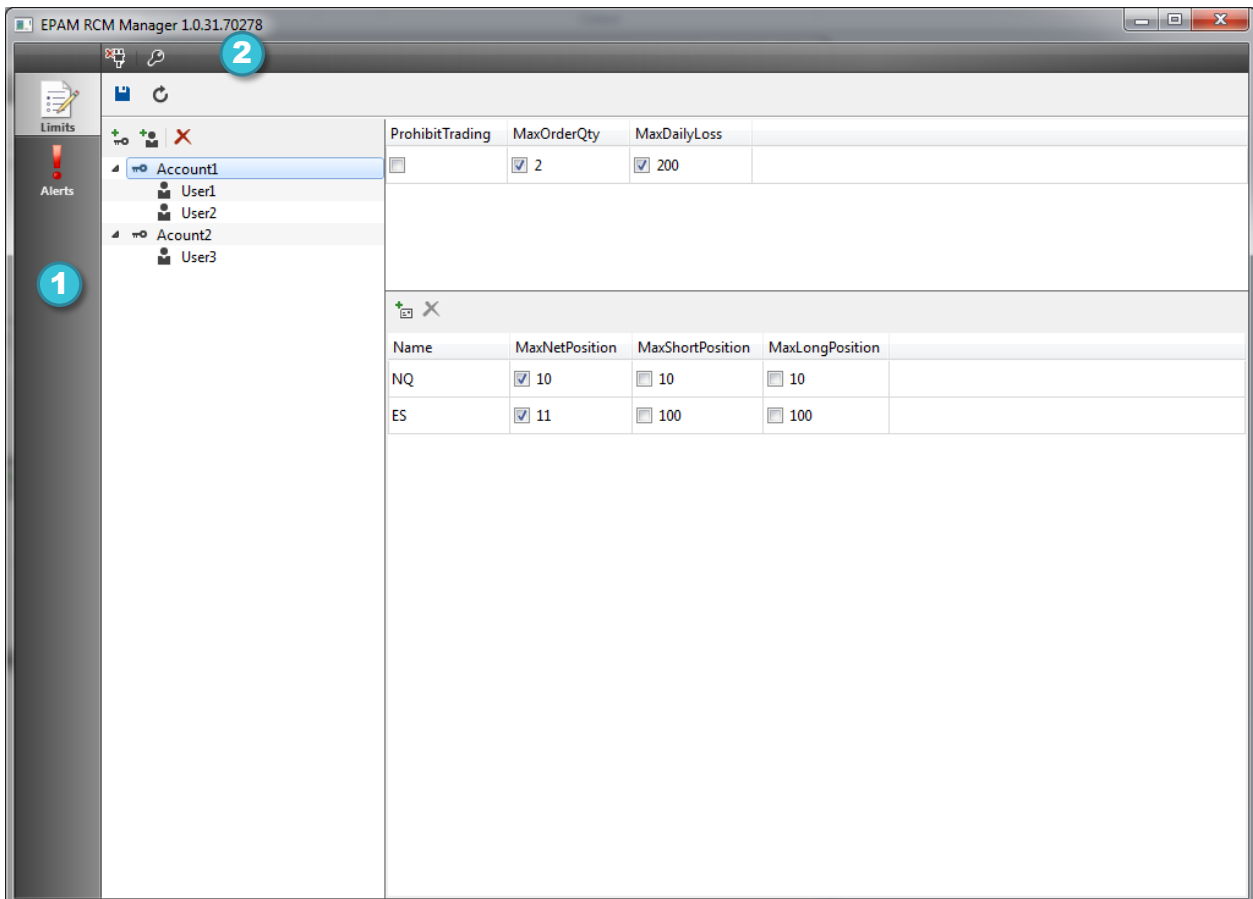


In the main window, you can do the following:

- You can use the mode selector (1) to change to another RCM Manager mode.
- You can use the main toolbar (2) to connect to or disconnect from the PTRCM.
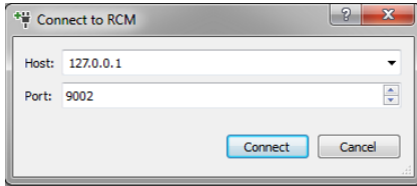
## Modes

The mode selector allows you quickly switching between tasks such as editing pre-trade limits (1) and viewing alerts (2).

## Connecting to PTRCM

Use the following steps to connect to the PTRCM:

- Click the ⚏ button on the main toolbar.
- Type an address of the PTRCM in the **Host** box.



- Type a port number in the **Port** box.
- Click **Connect.**

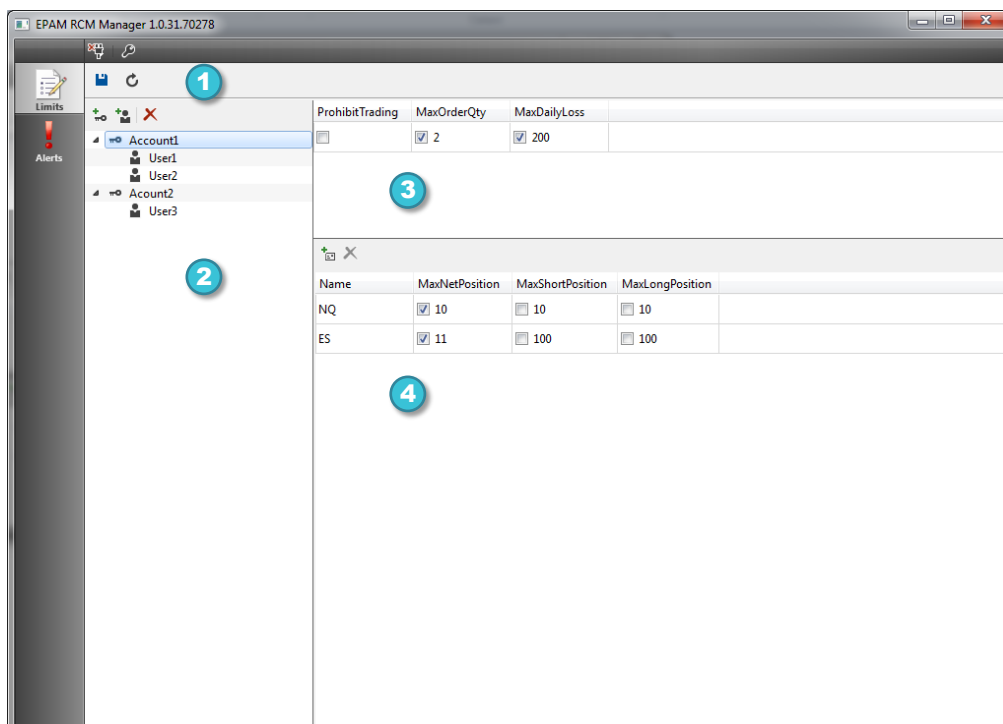> **Note**  The PTRCM uses 9002 as a default listen port number.

## Disconnecting from PTRCM

To disconnect from the PTRCM, click the ⚏ button on the main toolbar.

Once the disconnection is done, RCM Manager disables editing pre-trade limits.

## Editing Pre-Trade Limits

To edit pre-trade limits you need to switch to the Limits mode.

In this mode, you can do the following:

- Save and refresh pre-trade limits using the toolbar (1).
- Create and remove Levels in the Levels pane (2)
- Edit pre-trade level limits in the Level Limits (3).
- Edit pre-trade instrument limits in the Instrument pane (4).

## Creating Account Level

Use the following steps to create a new account level:

- Click the ![icon] button
- Type a new unique account name.
- Click the ![icon] button to save your changes in the PTRCM.

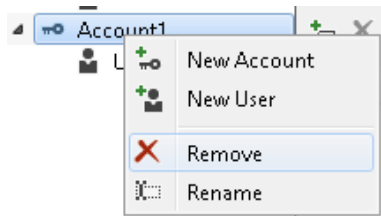The RCM Manager always creates a new account with one default user.

| ⚠ | **Important**  The new account level is applied after PTRCM restart only. |
|---|---|

## Removing Account Level

Use the following steps to remove an account level:

- Right-click the selected account, and then click **Remove**.



- Click the ![icon] button to save your changes in the PTRCM.

| 📄 | **Note**  The account level is removed along with all its users. |
|---|---|

## Creating User Level

Use the following steps to create a user level:

- Right-click the selected account, and then click **New User**. You can also click the ![icon] button.



- Type a new unique user name.
- Click the ![icon] button to save your changes in the PTRCM.

> ⚠️ **Important** The new user level is applied only after PTRCM restart.

## Removing User Level

Use the following steps to remove a user level:

- Right-click the selected user, and then click **Remove**.
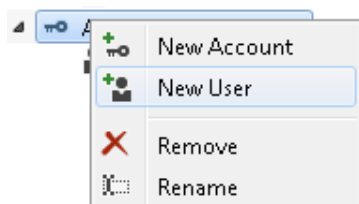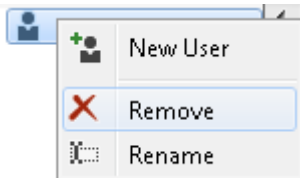


- Click the 💾 button to save your changes in the PTRCM.

> ⚠️ **Important** The removed user level is applied only after PTRCM restart.

## Editing Level Limits

Use the following steps to edit level limits:

- Select a level that you want to edit, in the Levels pane.
- Double-click a limit to start the edit in the Level Limits pane.
  - Press Enter to finish the edit. You can also click any-where in the Level Limits pane.
  - Press Esc to discard all changes.
- Select or clear the corresponding check box to turn the limit on/off.
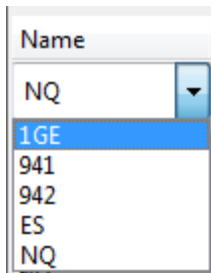- Click the 💾 button to save your changes in the PTRCM.

> ⚠️ **Important** The updated level limit is applied immediately on PTRCM right after you save your changes.

## Editing Instrument Limits

### Changing Name

Use the following steps to edit an instrument name:

- Select a level that you want to edit, in the Levels pane.
- Double-click an instrument name in the Instrument pane.
  - In the Name box, select the name you want to use.

- o Press Enter to finish the edit. You can also click any-where in the Level Limits pane.
- o Press Esc to discard all changes.
- Click the 💾 button to save your changes in the PTRCM.

⚠️ **Important** The new name of the instrument is applied immediately on PTRCM right after you save your changes.

## Changing Values

Use the following steps to change an instrument limit:

- Select a level that you want to edit, in the Levels pane
- Double-click an instrument limit to start the edit.
  - o Type a value.



  - o Press Enter to finish the edit. You can also click any-where in the Instrument pane.
  - o Press Esc to discard all changes.
- Select or clear the corresponding check box to turn the limit on/off.
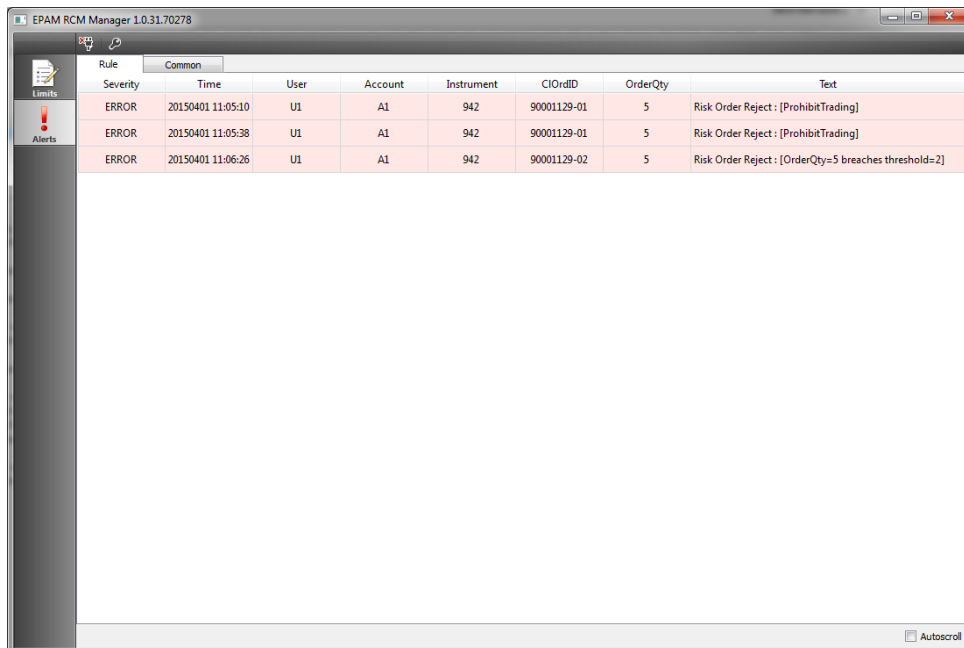- Click the 💾 button to save your changes in the PTRCM.

⚠️ **Important** The updated instrument limits are applied immediately on PTRCM right after you save your changes.

## Viewing Alerts

To edit alerts you need to switch to the Alert mode.  In this mode, you can view two types of alerts in two corresponding tabs: Rule and Common.

### Rule Alerts

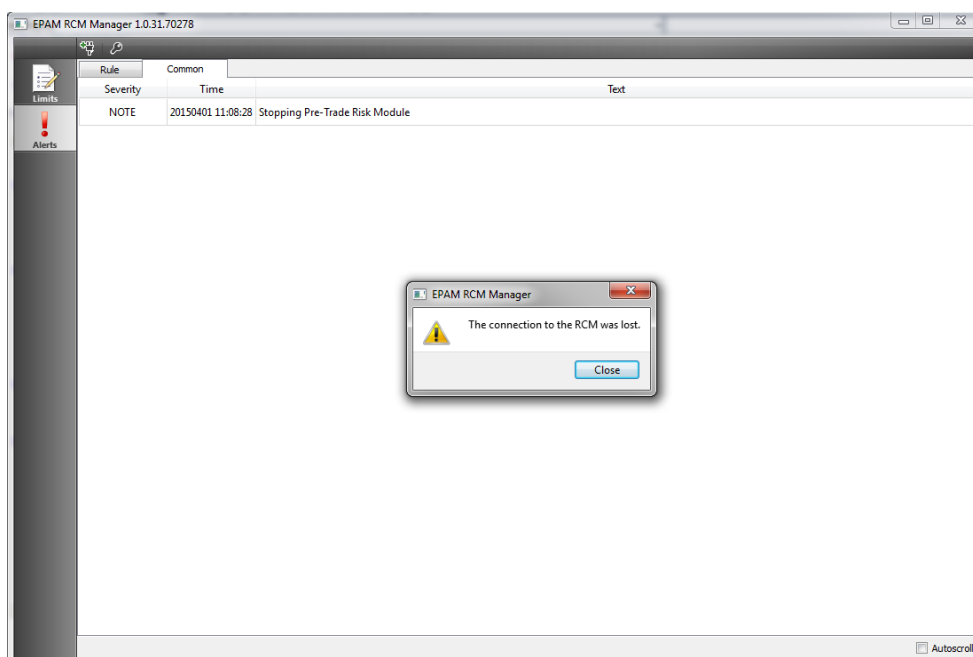The **Rule** tab shows alerts that PTRCM sends when checking one of pre-trade limits fails.



### Common Alerts

The **Common** tab shows alerts that PTRCM sends when something important occurs.

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