

**QuoteFlash**

*Wireless Real Time Financial Data Services*

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# **QuoteFlash for Nokia Series 60**

**(3650, 7650, 6600, 7610, 6630, etc..)**

(Version 1.8 – January 2005)

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## *User's Guide*

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## 1. Introduction

The QuoteFlash wireless financial information services are based on the use of the GSM/GPRS mobile phone network facilities with suitable phones (the Nokia series 60 phones (3650/6600/7650,etc..) have been validated and are currently supported). As they become available, other phones will be supported. Check the **QuoteFlash.com** web site for the latest status.

The services operate through a Java application that resides on the phone. It is therefore **not** a WAP or HTML WEB based system accessed through a browser, but a true data feed based service.

A careful reading of this guide as well as of the phone manual will enable any user to obtain in very little time the best use and results out of the QuoteFlash service.

### **System Requirements**

In order to use the QuoteFlash service, you need:

- A phone supporting Java (J2ME)
- To download the QuoteFlash application on the phone
- A subscription with an operator that includes **Web** GPRS access
- A valid QuoteFlash account, including the user defined data page specifications

### **Security and Confidentiality**

The QuoteFlash application operates under J2ME (CLDC/MIDP). This is a fully secure and protected environment (also called "sandbox"). The application has no access to any information on the phone, other than its own data. The application cannot affect or corrupt any part or other functions of the phone. Furthermore, removing the application deletes all trace of the application on the phone.

## 2. Phone Configuration

The phone must be configured for both the WAP access (only required for the application download) and GPRS Web access (for the QuoteFlash service operation)

### Remote Set-Up Service

Through the QuoteFlash customer support, your phone can be fully configured by us through remote commands. This means that the user does not have to enter any settings, but only validate the configuration messages. The sections below only apply for users that wish to perform their own set-up.

### 2.1 WAP Access Setup

#### WAP Access Points Configuration

This can be done through the operator web site from which a configuration SMS can be sent to the phone. Once received and saved, it is sufficient to open this SMS and validate the configuration.

We recommend that the GPRS WAP access point be configured as the default.

The WAP access points can also be configured manually. Refer to the phone manual for the instructions.

#### Download QuoteFlash WAP Site Bookmark Set-up

Form the phone menu, go to "**Services -> Options -> Add bookmark**", and add the QuoteFlash WAP site bookmark:

**<http://www.tefiso.de/qf/index.wml>**

You can set the default WAP access point for this bookmark by positioning on the bookmark line and going to "**Options -> Settings -> Default Access Point**" and select the required WAP access point. Note that if you download while in "Roaming", you must always use the WAP GPRS access point.



### 2.2 GPRS Settings and Web Access Point Configuration

The Quote Flash service requires the use of a Web access point (not WAP).

We recommend that a specific Web (internet) GPRS account be configured, manually or Over the Air through a configuration message (sent by us or through the operator web site) and that a new account be created. Modifying an existing account may not work.

Access point can also be configured "Over The Air" through the Nokia configurator facility at:

**<http://www.nokia.com> -> Support -> Product Support -> Get Settings -> order advanced settings**

#### Manual Access Point Setting

From the main phone menu go to:

**"Tools -> Settings -> Connection -> Access points -> Options -> New access point"** to create a web access point such that the **"Access Point Name"** refers to a Web (Internet) access point rather than a WAP access point. (if the access point has to be modified, go to **"Options -> Edit"**). Obtain the web access point name for your operator. Also, the gateway IP address must be set to **0.0.0.0**

The GPRS connection setting should be specified to **"When needed"**.  
For this setting go to: **"Tools -> Settings -> Connections -> GPRS"**

An access point specification would look like this:

Connection Name: Web Operator GPRS (can actually be anything you want)  
Data Bearer: GPRS  
Access Point Name: internet (Operator specific)  
User Name: None  
Prompt Password: No  
Password: None  
Authentication: Normal  
Gateway IP Address: 0.0.0.0

In **"Options -> Advance Settings"**

Phone IP Address: Dynamic  
Primary name Server: 0.0.0.0  
Second name server: 0.0.0.0

### 3. QuoteFlash Application Download (Initial and Upgrade)

Before you start the download, you must perform a "Clear Cache" of the Wap Browser.  
Go to and select: **"Services -> Bookmarks -> Options -> Clear cache"**

#### Initial Application Download (first time)

From the phone main menu, go to **"Services"** and open the **QuoteFlash bookmark** (download page).  
(The bookmark and its settings must be configured as specified under par. 2.1)  
Answer **"yes"** to the connection request.  
The WAP page is downloaded and displayed.  
Select the current application version (usually the one with the highest version number).  
Open to start the download and answer "yes" to the download message.  
The selected application is downloaded and the installation performed.

After this is done, go to Exit from the **"Options"** menu to close the page. Answer yes to **"Exit Browsing"**.

Exit from the menu and disconnect the call by pressing continuously the disconnect (red) key. Verify that the **"G"** connection indication on the top left of the screen has disappeared.

#### Application Upgrade

To download an upgrade, **do not remove the current application version**. Perform the download as for the initial download. After selecting the application to download, you will be requested to perform a **"Replace"** of the current version with the new version. Answer yes and the download and replace (upgrade) will occur automatically, as per the initial download.

If you remove the current version of the application and/or perform a new initial download, you will have to request a resetting of your account, as the information linking the phone to the account has been lost.  
This linking is performed at the first use (account access) of an application. It is preserved with an upgrade.

#### 3.1 Application Settings (not necessary for all phones)

The level of network access authorization must be set.

Go to **"Main phone menu -> Manager -> QuoteFlash -> Options -> Settings"** set the parameters as specified below:



## 3.2 Usefull Tips For Improved User Confort

### Backlight

When the screen backlight goes off, click the green key to turn it back on. this will avoid any other action being executed.

### Task Switching

To switch from one task to another (for instance from QuoteFlash to/from the phone function, press continuously the menu key. The reduced set of active tasks will be displayed making switching much easier and faster.

## 4. User Account Setup

In order to access a QuoteFlash service, you must have an account registered and the data page and page contents specified.

This specification includes:

- For each data page, the page name and page format (currently only one default format)
- For each page, the list of the instruments to be displayed on the page, in the order of display
- For each instrument, the display format (currently the “**Change**” in point or %)

The account is identified by a name that must be supplied when it first accessed (see section 5 for initial set-up). Once an account has been accessed from a phone, it can only be accessed from this particular phone. The account can be reset on demand if it must be accessed from another phone (for instance if the user changes phone) or if a new application was installed without going through the upgrade (Replace) procedure.

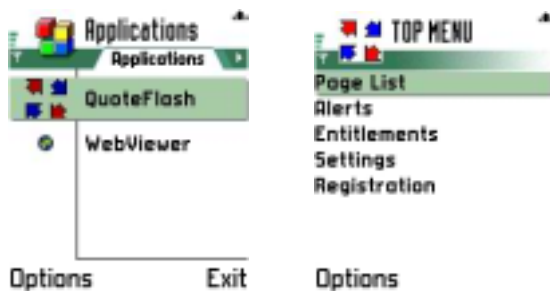
Initially, the account is configured by us (based on the user specifications). It can be changed at any time at the user request.

The user can have access to a web site (**QuoteFlash.com**) that provides the functionality to create and modify the account data specifications, within the assigned user entitlements. (See section 9 for the Web based facilities).

## 5. Start/Exit Application and Initial Setup

### 5.1 Start Application

From the phone Main Menu, select “**Applications**” and then the “**QuoteFlash**” application line. The application starts and the Top Menu is displayed:



### 5.2 Exit Application

To exit the application, go to the Top Menu and select “**Options -> Exit**”

### 5.3 Initial Setup

The first time an application is used, the account name and time zones must be set:

#### 5.3.1 Set Account

From the Application Top Menu, select “**Registration**”, enter the provided account name, respecting the upper/lower case, and validate through “**Options -> OK**”. The display returns to the Top Menu

Enter Account Name



### Note on Account Setting

The first time you connect with a new account setting, the system will link this phone to the account. Thereafter, the account can only be used from this phone. If an application upgrade (Replace) is performed, the settings are preserved.

If the user changes phone or installs a new application, the account must be reset to allow the connection and re-establish the link. Contact the support when this is necessary.

### 5.3.2 Set Timezone

There are two time zone settings:

- **Quote Time Offset** (adjusts the update time stamp from GMT)
- **Clock Time Offset** (adjusts the current time always displayed on the first line of a data/news display page)

The clock time is taken from the "Day and time" settings (set by user)

From the application Top Menu, select "**Settings**".  
 Select which time offset is to be adjusted by moving Up/Down.  
 Adjust the offset value by moving Right/Left  
 Validate through the "**Options -> OK**".



Return to the Top Menu through "**Options -> OK**".

## 6. Data Update and Display Facilities

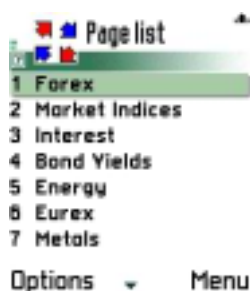
### 6.1 Application Connect

In order to get and display data updates, you must first be connected.

From the application Top Menu, select the "**Page List**" menu line (then select a page if there is already a page list displayed) and click the joystick (or press the navigation key for the 3650).

To select a page from the page list, move to the page line on the list and press the joystick (or navigation key). You can also select by pressing the key "0" on the keyboard.

#### Page List



The number associated with each page on the list corresponds to the "short key" allowing the switch from one page to another.

#### No Page (1<sup>st</sup> connection)



#### Data Page



When you request an update of the page (or press the joystick/navigation key if there is no page yet) while you are not yet connected, the list of configured Access Points is displayed. Select the configured **GPRS web access point**. On the Nokia 6600, you are asked to allow network access for this application, answer "Yes".

The connection will be established, the current data page configuration downloaded as well the current values for all instruments (as "**Repeat**" values, indicated with an "R" beside the time stamp). This may take about 20-30 sec for an average configuration.

### 6.2 Get Data Updates

#### Manual Updates

To update the currently displayed page, click the joystick or key 0 on the keyboard (or press the navigation key for the 3650).

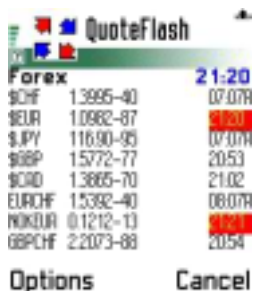
To update all the pages, while displaying any page, select "**Options ->Update All**".



The update time depends on how many instruments are being updated and on the network performance. The update time for the current page will normally be around 3-4 sec for an 8-10 line page. An "Update All" may take 5-8 sec). Whenever an update request is made, the status of the request is indicated at the top of the page ("requesting -> receiving -> processing"). If there is a problem with the connection, the indication will remain on "requesting" until a time out occurs. In this case, Exit and restart the application. Note that this top line displays the current page name and the current time (the time of the phone, adjusted with the clock time offset (see par 5.3.2 for clock offset setting)



The values that are updated are indicated on the time stamp (red for 3 sec. and then grey).



### Automatic Updates

It will be possible in a future version to set the system to request updates automatically with a periodicity specified by the user. This will require great care so as not to incur too high costs of transmission.

This feature is not available in the current version

### Repeat All

This Function, accessed through the "Options" menu while displaying a data page, will request a refresh of all data, whether there have been updates or not. The time stamp is displayed with an "R".

This is used only if the user feels that it is missing updates (should never happen!) and wishes to make sure that the pages are updated to the latest values.

This function is executed automatically when the first request is made after the start of the application.

## 6.3 Navigation Between Pages

To move between pages, you either return to the page list (with "Cancel") and select the desired page or move through the pages with the joystick (navigation key) left/right.

### Shortcut Keys

When displaying a page, you can go directly to any page by typing the page number on the keyboard. The short key value of each page is displayed with the page name on the page list menu.

## 6.4 Within Page Navigation and Display Details

In order to select a line and/or to scroll through a page that is longer than can be displayed on the screen, it is necessary to be in the **"within page navigation"**.

To go into within page navigation, move the joystick (or navigation key) downwards. A blue cursor appears on the top line symbol. You can now move Up/Down within the page (one line at a time) or fast scroll through the page with the Left/Right action. The cursor is removed with **"Cancel"**.

It is also possible to scroll within a page by clicking the key corresponding to the page number.

To display the detailed information for a value, position the cursor on the corresponding line and select **"Options -> Details"**. To return to the page, select **"Cancel"**

Page with cursor display (within page navigation mode)



QuoteFlash			
Market Indices 10:54			
SMI	5124.2	-1.48%	17:32R
DAX	3484.58	-0.24%	20:08R
CAC40	3311.42	-0.35%	17:31R
FTSE	4161.1	-0.68%	17:36R
REX	329.41	-0.52%	17:31R
STRE30	2326.71	-0.75%	20:08R
DJI	9415.02	+0.44%	22:02R
IOC	1810.45	-0.57%	22:48R

Options      Cancel

Detailed Information Screen



QuoteFlash			
Market Indices 10:55			
<b>Details</b>			
Update All			
Update Screen			
Repeat All			
Save News			
Exit			

Select      Cancel

QuoteFlash			
Market Indices 10:56			
DAX			29/08
DAX	3484.58	-0.24%	-8.08 20:05
Close	3492.07		20:08
High	3531.80		29/08 09:06
Low	3479.92		29/08 15:49

Options      Cancel

Select **"Cancel"** or **"Options -> List"** to return to the data page

## 6.5 News Headline Page Display, Updating and Saving

The current version allows one news headline page, with a max of 50 headlines stored (last 50 headlines).

The news are sorted by their time with the most recent news on top.

To update the news page, click the joystick (or the navigation key) while the news page is being displayed.

Currently the update will supply all the news that have not yet been received, going back 2 hours.

Note that the "**Update All**" function does not update the news page.

The news headlines are displayed one at a time and the scrolling is also one news at a time.

The news received with the last update are indicated with the first line "greyed".

The first line indicates the order of the news in the list, the news group name and the news time stamp.

Unless saved, the news headlines are stored only for the duration of an application session. To keep the news, they have to be saved before terminating the application. From any page, go to and select: "**Options -> Save News**".

News Page



Options

Cancel

## 7. Recommendations Regarding Data Transmission Costs

The system has been optimised to use as few characters as possible for the transmission of updates. Also, the current version with the manual update request limits the risk of high transmission costs without user control.

To further optimise the transmission costs, we recommend the following:

- Do not terminate the application unless no further updates are required. There is no cost in keeping connected permanently with GPRS. In fact, it costs less as there are overheads associated with each new connection.
- If you require a fast update of a specific value, display the corresponding page and update only this page.
- Values for which updates are required frequently should be regrouped on the same page, so as to be updated as part of a single page request.
- Do not request "Repeat All" unless you feel your data is incorrect (this should never happen)
- If you require updates for data contained in several pages, do an "Update All" rather than multiple single page updates

The experience shows that the costs can be maintained within a reasonable level (Sfrs 20-30.-/Month), including for extensive use. The costs associated with the QuoteFlash service are considerably lower than what is incurred with WAP or WEB based applications.

## 8. Handling of Error Situations

- In case of problem, first try to exit the application and restart.
- Additionally, while on the top menu, you can select "**Options -> Reset Data Only**". This will clear the pages and exit the application. You can then restart.  
Note that you should not use the "**Reset All**" except when instructed to do so by our support.
- If the problem persists, switch the phone OFF and then switch it ON again
- If the application still does not start, uninstall and reload the application:

### **Delete Application**

From the phone main menu, go to "**Application**", position on the QuoteFlash application line, and through the "**Options**" menu, select "**Remove**".

### **Download and Install/Upgrade Application**

You can download again the same application download another version. You must the request from the support a reset of your account.

- If when requesting an update, the indication "requesting..." on the top line remains for more than 60-90 sec., it means that the GPRS connection has failed. Exit and restart the application.

## 9. Web Based Service Information and User Set-Up Facilities

The Web site is located at the URL: [www.quoteflash.com](http://www.quoteflash.com)

### 9.1 Service Information

Two levels of service information are provided and updated daily:

- latest news regarding the QuoteFlash service (new versions, additional data, new device support etc.)
- service status (global status, mobile networks, exchanges, data feed/internet)



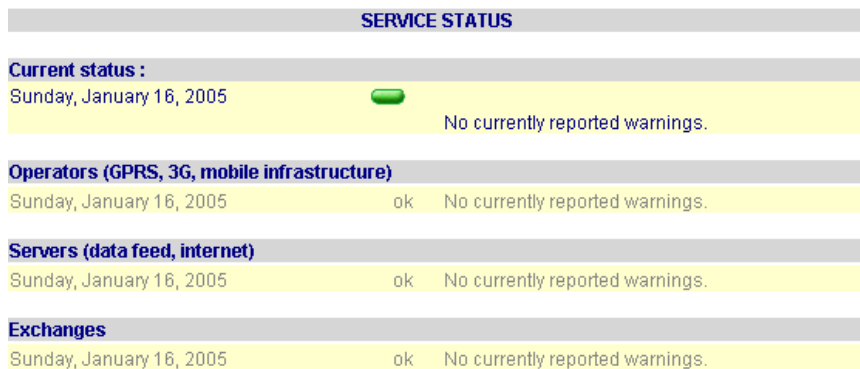
#### Latest News

The information is displayed by selecting the "Latest News" line on the web page



#### Service Status

This indicates whether there is any problem with the service. A green light indicates no current problem. If another colour is shown, display the detailed information by selecting the "Service Status" line.



### 9.2 Web site user facilities

The user can create and/or modify pages. In order to display the account and the facilities, the user must enter the "User (Account) Name" (same name as used for the registration on the device) and a password (initially there is no password. The user can set one if needed).

#### 9.2.1 Browser Settings

In order to access the web site and make full use of its facilities, some settings are required in the browser. These settings are very much standard and do not affect the security or any other aspect of the browser operation.

### Settings for Internet Explorer 6.x

- Cookies

In **"Tools -> Internet options -> Privacy -> Advanced"**, make sure that the **"Always allow session cookies"** is set.

- Cache Parameters

Go to **"Tools -> Internet options -> General"**

In Section **"Temporary Internet Files -> Settings"**, set the option for **"check for newer version of stored pages"** to **"automatically"**

- Refresh

Go to **"Tools -> Internet options -> Security -> Custom level -> Allow META REFRESH"** and set to **"Enable"**

### Settings for Internet Explorer 5.x

- Cookies

In **"Tools -> Internet options -> Security -> Custom level"**, make sure that the **"Allow per-session cookies (not stored)"** is set to **"Enable"**.

- Cache Parameters

Go to **"Tools -> Internet options -> General"**

In Section **"Temporary Internet Files -> Settings"**, set the option for **"Check for newer version of stored pages"** to **"automatically"**

## 9.2.2 Web Page Layout

The screenshot shows the QuoteFlash web interface. The top navigation bar includes 'QuoteFlash' and 'Mobile Phone Financial Data Services'. The main content area is divided into several sections:

- Site Map:** Links for Service Description, Account Management, PDF Documentation, and Customer Login.
- PDF Documentation:** A list of documents with titles like 'Quote Ninja 7850-3658' and their respective page counts.
- Account:** Displays the account name 'TEST1' and owner 'Doe John'.
- Pages:** A table listing various financial data pages (A-1 to A-9) with their categories and update frequencies.
- Page Contents:** A table listing financial instruments (e.g., \$CHF, \$EUR, \$GBP) and their update frequencies.
- Subscribed Groups:** A list of subscribed groups (e.g., [News], CBOT (Financials), CMC (COM)).
- Instruments:** A table listing various financial instruments (e.g., \$AUD, \$BRL, \$CAD).

At the bottom, there are buttons for 'Add', 'Del', 'Edit', 'Up', and 'Down', along with a 'SEND TO PHONE' button.

The web page is divided in sections:

#### **Account**

This is the account name and owner of the account logged in

#### **Pages**

This lists the pages already specified for this account

#### **Page Contents**

This lists the instruments contained in the highlighted page, in the order of display on the phone (a max of 50 instruments can be specified on a page)

## Subscribed Groups

These are the data groups and exchanges that have been subscribed by the user, together with the access level authorized (Real-time or Delayed). This can not be changed by the user.

## Instruments

These are the instruments that are supported for the highlighted group. If instruments that are required are not listed, contact the support and, save exceptions, they will be added to the list.

## PDF Documentation

These are the commercial documents that can be displayed (if your browser supports it), printed or downloaded.

## 9.3 Set-up Functions

### 9.3.1 Create a new page

In the "Pages" section, click "Add". A box is displayed at the top left:

As matrix navigation is not currently supported, we recommend that you define only one row ("A") and number the pages sequentially.

A page can be one of two types, "Data" or "News". Only one news headline page can be specified.

The format of the page is 1 or 2 lines per instrument and if 1 line, with 3 or 4 columns.

Currently, the application overrides this setting and assigns the format automatically.

### 9.3.2 Edit a Page

Highlight the page line in the "Pages" window and select "Edit". The following is displayed (top left):

All the fields can be edited. To change the page order in the page list, change the column number within the page row.

### 9.3.3 Add/Remove an Instrument To/From a Page

First of all, you have to check if the required instrument is currently included in the service.

Select the relevant data group in the "Subscribed Groups" window.

Highlight an instrument in the "Instrument" window and perform a "CTRL-F" on the keyboard. The following is displayed:

Type any part of the instrument name and if found you can proceed with the selection. If not, you have to request the inclusion of this instrument in the service ([support@dts.ch](mailto:support@dts.ch)).

If the instrument is in the list, you can proceed with the instrument add:

- a) Highlight the page in the "Pages" section.
- b) Select the instrument group in the "Subscribed Groups" section
- c) Click "Add" in the "Page contents" section

The following is displayed (top left):



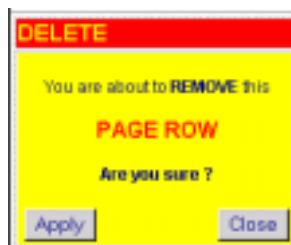
Select the instrument to be added to the page (select also the "Change" format when applicable).

The instrument will be added in the page at a position above the currently highlighted instrument. To add the instrument as the last on the page, first select the **(End-of-Page)** line

The instruments can be moved with the "Up/Down" buttons in the "Page contents" section.

To keep adding instruments from another group, select the group in the **"Subscribed Groups"** window.

To **remove** an instrument, select it in the "Page contents" section and click "Del". The following is displayed (top left):



#### 9.3.4 Set the Instrument Display Parameter

A page can be edited at any time.

Select the instrument in the "Page contents" section and click "Edit". The following is displayed (top left):



The display of the "Change" value (4 column display only) can be in "Point" or "Percent".

Note that on the phone, in the detailed information screen, both are displayed.

#### 9.3.5 Activate Settings

To activate the current settings on the phone, click on **"SEND TO PHONE"**.

You need to perform a **"Logout"** then a **"Login & Repeat"** to make the new settings effective on the BlackBerry.

### 9.3.6 Account information Editing

Click "Edit" in the "Account" section. The following is displayed (top left):



The screenshot shows a web form titled "Edit your account" with a yellow background. The form contains the following fields and values:

Title	Mr
First name	John
Last name	Doe
Email	doe@here.com
Phone	9986543213456
Language	English
Expiration	31.12.2003
User ID	TEST1
Password	test

At the bottom of the form are two buttons: "Apply" and "Close".

All the fields can be modified by the user, including the password for web access to the account. (initially, there is no password, we recommend that one is set at the first visit).