Caplin Trader Client 1.3

Simple Form Component Configuration Reference – DRAFT

December 2008

Contents

1 Preface

1.1 What this document contains

This reference document describes the XML and XHTML based configuration that defines a simple form display component in Caplin Trader Client.

The information in this document applies to Caplin Trader version 1.3.

About Caplin document formats

This document is supplied in three formats:

◆ Portable document format (*.PDF* file), which you can read on-line using a suitable PDF reader such as Adobe Reader®. This version of the document is formatted as a printable manual; you can print it from the PDF reader.

◆ Web pages (*.HTML* files), which you can read on-line using a web browser. To read the web version of the document navigate to the *HTMLDoc_m_n* folder and open the file *index.html*.

◆ Microsoft HTML Help (*.CHM* file), which is an HTML format contained in a single file.
To read a *.CHM* file just open it – no web browser is needed.

Restrictions on viewing .CHM files

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http://support.microsoft.com/kb/896054/.

1.2 Who should read this document

This document is intended for System Administrators and Software Developers who need to put composite display components in Caplin Trader Client.

1.3 Related documents

◆ **Caplin Trader Client: Composite Component Configuration XML Reference**

Describes the XML-based configuration that defines the layout and functionality of the composite display component in Caplin Trader Client. A composite display component can include simple form display components.

◆ **Caplin Trader Client: Customizing the Appearance**

Describes how to configure the on-screen layout and 'look and feel' of the Caplin Trader Client, and includes a section on layout concepts in which Panels are explained.

1.4   Typographical conventions

The following typographical conventions are used to identify particular elements within the text.

Type	*Uses*
aMethod	Function or method name
aParameter	Parameter or variable name
/AFolder/Afile.txt	File names, folders and directories
``` Some code; ```	Program output and code examples
The `value=10` attribute is...	Code fragment in line with normal text
Some text in a dialog box	Dialog box output
`Something typed in`	User input – things you type at the computer keyboard
XYZ Product Overview	Document name
◆	Information bullet point
■	Action bullet point – an action you should perform

> **Note:**   Important Notes are enclosed within a box like this.
> Please pay particular attention to these points to ensure proper configuration and operation of the solution.

> **Tip:**   Useful information is enclosed within a box like this.
> Use these points to find out where to get more help on a topic.

1.5   Feedback

Customer feedback can only improve the quality of our product documentation, and we would welcome any comments, criticisms or suggestions you may have regarding this document.

Please email your feedback to documentation@caplin.com.

1.6   Acknowledgments

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2 Introduction to the simple form component

The simple form component allows end-users of Caplin Trader Client to enter information into displayed pages.

For example, when used in conjunction with the grid display component, the simple form component can provide a "quick search" facility; a user can enter search criteria that select a particular set of financial instruments to be displayed in the grid.

Simple form component providing a "quick search" facility

The above picture shows a simple form component that implements the "quick search". The simple form component is usually embedded in a composite component along with other display components. In the example above, it is embedded in a composite display component, which also contains another simple form component (the Product Finder with Clear button), a tree view (below the Product Finder), and a grid (on the right).

The user can supply search criteria to the Quick Search and select Go; Caplin Trader then populates the grid with the instruments that match the search criteria. For example, if the user types "Austria" in the search box and selects the Search All radio button, when Go is selected Caplin Trader displays in the grid all the instruments that have the string "Austria" in any fields.

A simple form component is defined through an XML tag and an associated simple form template defined in XHTML.

For more information about composite components, see **Caplin Trader Client: Composite Component Configuration XML Reference**.

Simple form components can also be put directly into Panels. For more information about Panels, see **Caplin Trader Client: Customizing the Appearance**.

3 Getting started

The following sections explain how XML and XHTML tags are used to define a simple form display component for Caplin Trader Client.

3.1 Technical assumptions and restrictions

XML

The XML markup defined in this document conforms to XML version 1.0 and the XML schema version defined at
http://www.w3.org/2001/XMLSchema.

3.2 An example of simple form configuration

An example XML file describing a simple form display component is shown below.

The XML Reference information ⌐9⌐ section defines the XML tags and attributes you can use to define simple form display components in Caplin Trader Client pages. Also see the section Ordering and nesting of tags ⌐8⌐.

XML that configures a simple form display component

```
<Panel>
  <compositeComponent controller="caplinx.composite.TreeGridComboController">
    <terrace>
      <tower width="300px">
        <component id="fiQuickSearch" height="88px">
          <simpleForm src="source/html-templates/quick-search.html" />
        </component>
        <component id="fiTree">
          <tree baseTemplate="FiProductSearchTree" />
        </component>
      </tower>

      <splitter />
      <component id="fiGrid">
        <grid baseGrid="FiProductSearchGrid" />
      </component>
    </terrace>
  </compositeComponent>
</Panel>
```

The XML in this example defines a composite display component within a Caplin Trader Client Panel. The composite display component comprises:

◆ A "quick search" simple form display component (`<component id="fiQuickSearch"...>`)

◆ A tree view component (`<component id="fiTree">`)

◆ A product grid (`<component id="fiGrid">`)

> **Tip:** For a full explanation of the XML that defines composite display components, please refer to the document **Caplin Trader Client: Composite Component Configuration XML Reference**.

Defining the simple form component and simple form template

The simple form component is defined thorough the `<simpleForm>` XML tag:

```
<simpleForm src="source/html-templates/quick-search.html" />
```

The file path in the `src` attribute of this tag specifies a template for a simple XHTML form; the **simple form template**. In this example the template is the "quick search" form, defined as follows:

Example of simple form template for "quick search"

```
<table cellpadding="1px" cellspacing="1px">

  <input type="text" name="QUICK_SEARCH_VALUE" />

  <input type="submit" id="SIMPLE_FORM_SUBMIT_ID" value="GO" />

  <input type="radio" name="QUICK_SEARCH_FIELDS"
        value="Description|MaturityDate" >
  Desc / Mat Date
  </input>

  <input type="radio" name="QUICK_SEARCH_FIELDS"
      value="ALL_FIELDS">
  Search All
  </input>

</table>
```
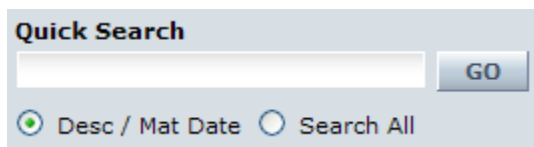
When Caplin Trader applies this template, it renders the following "quick search" form on the screen:

**"Quick search" form
rendered on the screen**

The `<input>` tags defined in this particular form template refer to the quick search parameters that are supplied to Caplin Trader Client's Product Search Controller JavaScript component:

◆ `QUICK_SEARCH_VALUE` (only one) identifies the html element that holds the search value when the form is submitted.

◆ `SIMPLE_FORM_SUBMIT_ID` (only one) identifies the html element that submits the form.

◆ `QUICK_SEARCH_FIELDS` (one or more) identifies the fields in the RTTP message (containing financial instrument data), that are to be searched when the form is submitted. The values that can be specified are:

`<rttp-field>|<rttp-field>|<rttp-field>` List of fields to search in.

`ALL_FIELDS` A special field name which tells the controller to search within all available grid fields.

This particular simple form template is designed to work only with the Product Search Controller JavaScript component, so there are limitations on how the template can be changed without needing to also modify the Product Search Controller. You can make the following changes without impacting the Product Search Controller code:

◆ Change the text displayed on the submit buttons.

◆ Change the text displayed against the input fields and/or radio buttons.

◆ Change the fields that are searched when a radio button is selected.

◆ Add additional radio buttons to qualify the search
(by coding additional `<input type="radio" ...>` tags).

Determining the appearance of the form

You set the appearance of the form (color, text styles, submit button style, and so on), through the HTML code in the simple form template and/or through external CSS definitions.

Implementing your own simple form component

In general, if you implement a simple form component that captures user input for some other purpose than quick searches, you will also need to need to implement a mechanism (such as a "controller" component) to receive and process the data. The XHTML needed in the simple form template will depend on what data the form has to capture and how the data is passed to the receiving component.

However, all simple form components must contain a submit button and the simple form template must therefore contain the following code to specify the button. The `id` attribute must be set to `"SIMPLE_FORM_SUBMIT_ID"`.

Simple form template: mandatory code for specifying submit button

```
<input type="submit" id="SIMPLE_FORM_SUBMIT_ID"
       value="text displayed on submit button" />
```

3.3   Using the XML configuration markup

Ordering and nesting of XML tags

Each top level tag is shown below, together with the child tags that it can typically contain (the children are in no particular order).

Tip: Advanced users may wish to consult the Relax NG Schema
            (*simpleFormComponentDefinitions.rnc*)
            for definitive information on the ordering and nesting of tags.

For a description of each tag and its attributes, see the XML Reference information section.

<simpleForm>

This is the outermost (and only) tag
```
<simpleForm />
```

4   XML Reference information

This is the reference information for the configuration XML describing the simple form display component.

Default attribute values

In the tables that follow, if an attribute is not required (Req? = 'N') and there is a default value specified, then not supplying the attribute is equivalent to setting the attribute to this default value. If an attribute is not required and the default is '(none)', then not supplying the attribute can result in one of two behaviors, depending on the particular attribute – either the behavior is as specified in the description column of the table, or there is no effect on the appearance or behavior of the component.

4.1   <simpleForm>

`<simpleForm>`

This is the outermost (and only) tag that defines a simple form display component.

Attributes:

Name	Type	Default	Req?	Description
src	string	(none)	Y	The path of a file that provides a template for a simple HTML form. The template can contain any valid XHTML with any combination of XHTML form elements. At run time, Caplin Trader Client inserts the form defined by the XHTML into the display component where this <simpleForm> tag is configured. The display component would typically be a composite component or a Panel.

5   Glossary of terms and acronyms

This section contains a glossary of terms, acronyms, and abbreviations, used in this document.

Term	Definition
Panel	A rectangular area in the Caplin Trader Client user interface in which HTML content and display components may be loaded.
	For a fuller explanation see **Caplin Trader Client: Customizing the Appearance**.
RTTP	Real Time Text Protocol
	Caplin's object-oriented, real-time, protocol for the distribution of financial data and trade messages over internet-protocol networks between client applications (such as Caplin Trader Client) and Caplin Liberator.
RTTP message	A message, usually containing financial data, that is sent between a client application (such as Caplin Trader Client) and Caplin Liberator, via **RTTP**.

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