

# Caplin Trader Client 1.4

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## Simple Form Component Configuration Reference

March 2009

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# 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 1.4.

### 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.

#### For the best reading experience

On the machine where your browser or PDF reader runs, install the following Microsoft Windows® fonts: Arial, Courier New, Times New Roman, Tahoma. You must have a suitable Microsoft license to use these fonts.

#### Restrictions on viewing *.CHM* files

You can only read *.CHM* files from Microsoft Windows.

Microsoft Windows security restrictions may prevent you from viewing the content of *.CHM* files that are located on network drives. To fix this either copy the file to a local hard drive on your PC (for example the Desktop), or ask your System Administrator to grant access to the file across the network. For more information see the Microsoft knowledge base article at <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 simple form display components in Caplin Trader Client, so that end-users can enter information into a displayed page.

## 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.
- ◆ **Caplin Trader Client: How To Create A Product Finder Composite Component**  
Explains how to create a product finder using the Caplin Trader Client composite component, two simple forms, a grid and a tree. It refers to the product finder in the Caplin Trader Client reference implementation.

## 1.4 Typographical conventions

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

Type	Uses
<b>aMethod</b>	Function or method name
<i>aParameter</i>	Parameter or variable name
<i>/AFolder/Afile.txt</i>	File names, folders and directories
<div>Some code;</div>	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
<b>XYZ Product Overview</b>	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](mailto:documentation@caplin.com).

## **1.6 Acknowledgments**

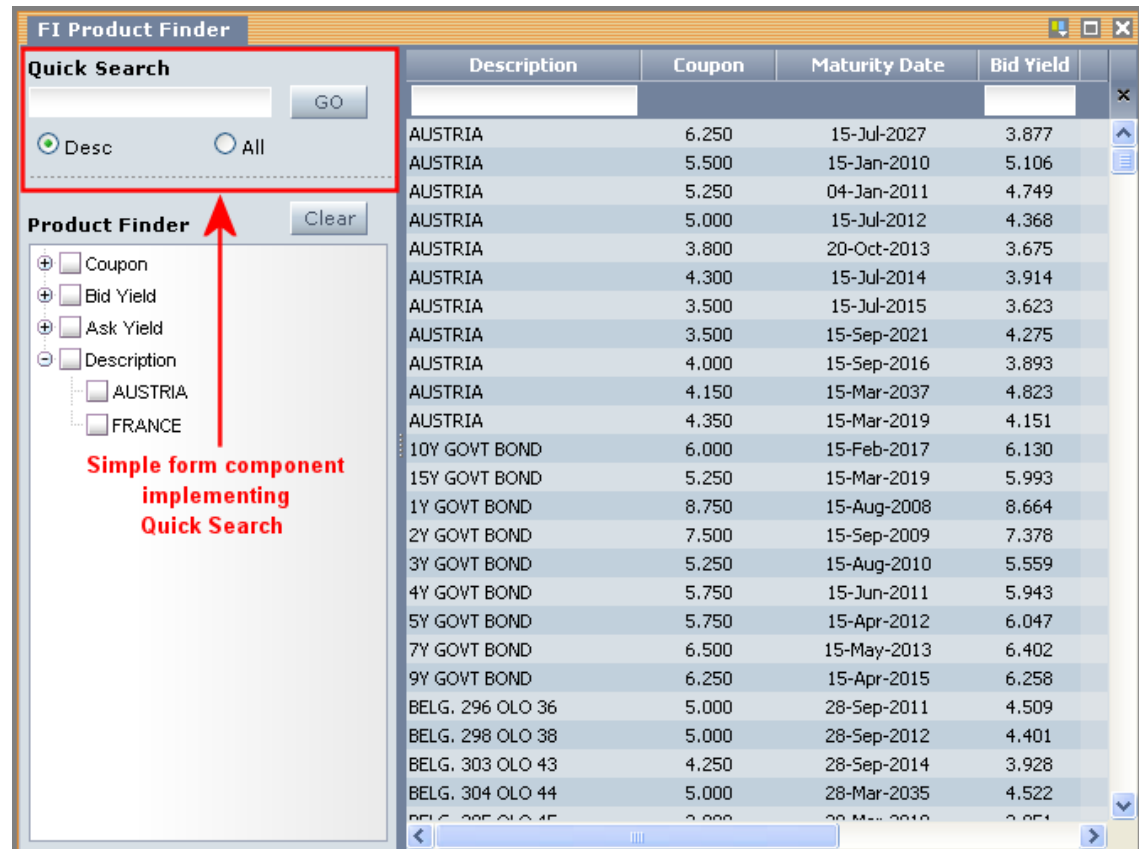
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## 2 Introduction to the simple form component

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

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 to find and display a particular set of financial instruments 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 field.

A simple form component is defined through an XML tag and an associated simple form definition 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 that includes two simple form display components is shown below.

The [XML Reference information](#)<sup>[11]</sup> 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](#)<sup>[10]</sup>.

#### XML configuration that includes simple form display components

```
<Panel ... >
  <state>
    <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="productFinderButtons" height="30px">
            <simpleForm src="source/html-templates/product-finder-buttons.html" />
          </component>

          <component id="fiTree">
            <tree baseTemplate="FiProductSearchTree" />
          </component>
        </tower>
      </terrace>
    </compositeComponent>
  </state>
</Panel>
```

The XML in this example defines a composite display component within a Caplin Trader Client Panel. The composite display component contains two simple form display components:

- ◆ A “quick search” simple form display component  
(`<component id="fiQuickSearch"...>`)
- ◆ A “product finder” simple form display component  
(`<component id="productFinderButtons"...>`)

These XML fragments render the Quick Search and Product Finder dialog boxes shown in the picture in [Introduction to the simple form component](#) <sup>4</sup>.

For completeness the example also contains the XML configuration for the other two components shown in the picture:

- ◆ A tree view component that is part of the product finder  
(`<component id="fiTree">`)
- ◆ The product grid that displays the data retrieved by the quick search  
(`<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

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

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

The file path in the `src` attribute of this tag specifies a simple XHTML form. In this example the form is the “quick search” form, defined as follows:

### Example definition of a simple form for “quick search”

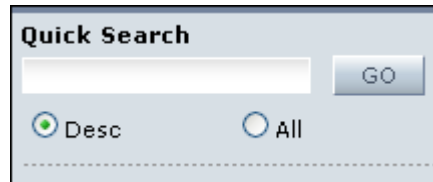
```
<div id="FiQuickSearch">
  <div class="background">

    <div class="heading">Quick Search</div>
    <div id="quickSearchTextBoxHolder"><input type="text" name="QUICK_SEARCH_VALUE"
      class="quickSearchTextBox"/></div>
    <div id="submitButtonHolder"><input type="submit" id="SIMPLE_FORM_SUBMIT_ID"
      value="GO" class="submitButton"/></div>
    <div id="radioOneHolder" class="searchOption"><input type="radio"
      name="QUICK_SEARCH_FIELDS" value="Description" checked="true">Desc</input></div>
    <div id="radioTwoHolder" class="searchOption"><input type="radio"
      name="QUICK_SEARCH_FIELDS" value="ALL_FIELDS">All</input></div>

  </div>

  <div class="horizontalLine"/>
</div>
```

This XHTML renders the following “quick search” form on the screen:



**“Quick search” form  
rendered on the screen**

Here is a description of the simple form elements.

- ◆ **<div class="heading">**  
Provides the text for the Quick Search filter heading ("Quick Search").
- ◆ **<div id="quickSearchTextBoxHolder">**  
Provides a text input box. The end user types text into this box to filter the grid.
- ◆ **<div id="submitButtonHolder">**  
Provides a submit button labeled GO (value="GO"). The end user clicks this button to filter the grid according to the text that is typed into the input box (div id="quickSearchTextBoxHolder").
- ◆ **<div id="radioOneHolder">**  
Provides a radio button. The end user selects this button to restrict the filter to the 'Description' column of the grid (value="Description").
- ◆ **<div id="radioTwoHolder">**  
Provides a radio button. The end user selects this button to apply the filter to all columns of the grid (value="ALL\_FIELDS").
- ◆ **<div class="horizontalLine">**  
Provides a horizontal line below the two radio buttons.

This particular simple form definition is designed to work with the Caplin Trader Product Search Controller JavaScript component (**caplinx.composite.FiProductFinderController**), so there are limitations on how the XHTML 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 XHTML code in the simple form definition and/or through external CSS definitions. This is not shown in the example, so as to show more clearly the code that is essential to define the form.

**Tip:** In the reference implementation of Caplin Trader Client, the classes that style the XHTML for the quick search filter form are defined in the file *CaplinTrader/source/styles/fi-product-finder.css*.

## 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 implement a mechanism (such as a “controller” component) to receive and process the data. The XHTML needed to define the form 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 definition must therefore contain the following code to specify the button. For the “quick search” simple form, the `id` attribute must be set to “`SIMPLE_FORM_SUBMIT_ID`”.

### Simple form definition: mandatory code for specifying the submit button

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


**Tip:** **Caplin Trader Client: How To Create A Product Finder Composite Component** discusses the simple forms and example JavaScript controller that are supplied with the product finder in the reference implementation of Caplin Trader Client. The document also describes how to change the behavior of the product finder by modifying code in the example JavaScript controller.

### 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.

### 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 contains the definition of the form. This file can consist of 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
<b>Panel</b>	<p>A rectangular area in the Caplin Trader Client user interface in which HTML content and display components may be loaded.</p> <p>For a fuller explanation see <b>Caplin Trader Client: Customizing The Appearance</b>.</p>
<b>RTTP</b>	<p><u>R</u>ea<u>T</u>ime <u>T</u>ext <u>P</u>rotocol</p> <p>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.</p>
<b>RTTP message</b>	<p>A message, usually containing financial data, that is sent between a client application (such as Caplin Trader Client) and Caplin Liberator, via <b>RTTP</b>.</p>

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