

CAPLIN

# Caplin Trader 2.1

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## User Layout Configuration XML Reference

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CONFIDENTIAL

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# 1 Preface

## 1.1 What this document contains

This reference document describes the XML-based configuration that defines which layouts and themes end-users can access in a Caplin Trader application.

### 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 Software Developers who need to configure user information and default layouts in Caplin Trader.

## 1.3 Related documents

### ◆ Layout Caplin Trader: Layout Configuration XML Reference

Describes the XML-based configuration that defines the layout of a Caplin Trader application, and other aspects of its appearance, to the Layout Manager.

## 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
/AFolder/Afile.txt	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.

Information about the applicability of a section is enclosed in a box like this.  
For example: "This section only applies to version 1.3 of the product."

## 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.

Visit our feedback web page at <https://support.caplin.com/documentfeedback/>.

## 1.6 Acknowledgments

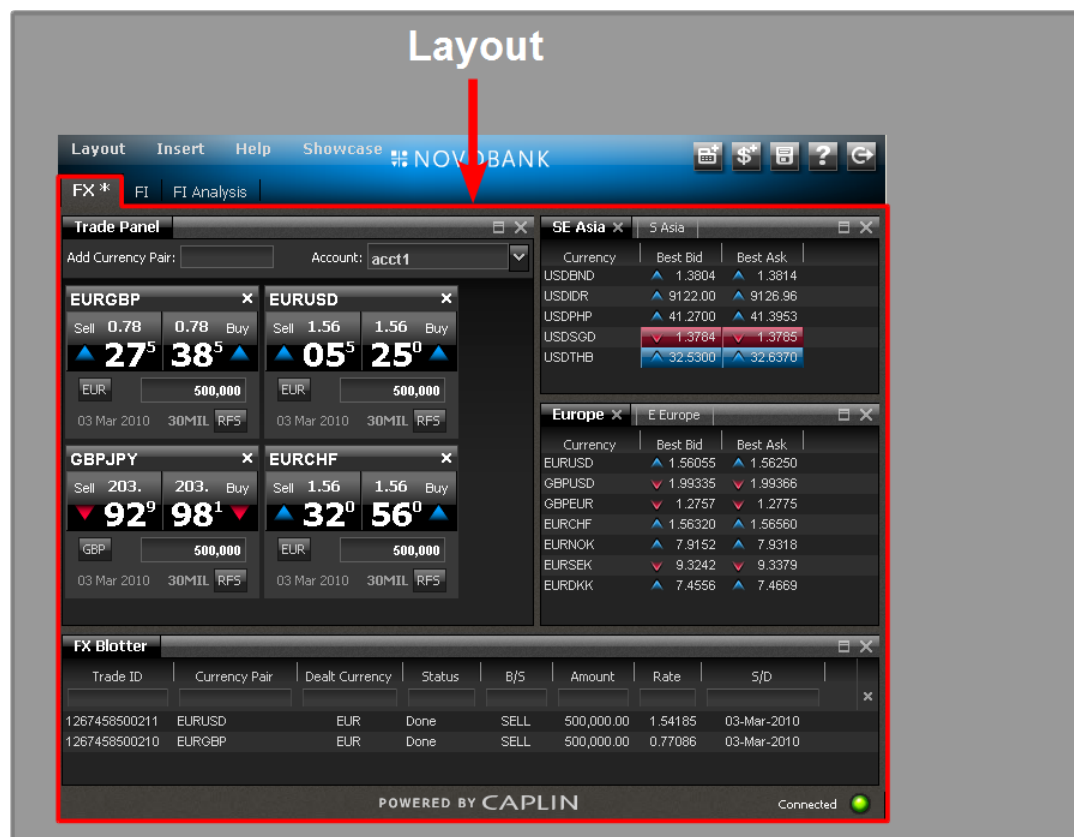
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## 2 Overview

The display components that comprise the user's view of a Caplin Trader application are grouped into **layouts**.

The following diagram shows a Caplin Trader application with a layout (red border) that provides price data and trading capabilities for Foreign Exchange (FX) instruments. There are two other layouts available: Fixed Income (FI) and FI Analysis. The layouts are organized in tabs (FX, FI, FI Analysis), and the end-user can switch between layouts by selecting the relevant tab.



Caplin Trader Layout

The configuration described in this document allows you to define which layouts end-users can access in a Caplin Trader application. Once you have designed and implemented a layout, you must include it in the configuration so that it is available to end-users.

The configuration allows you to:

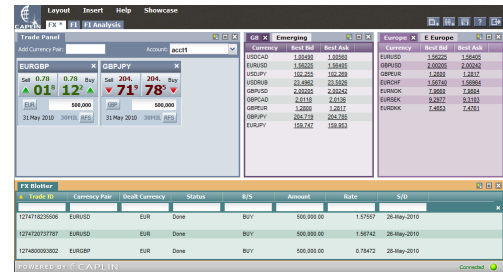
- ◆ Add layouts that always appear when the application starts up – the user cannot close such a layout.
- ◆ Add layouts that do not appear when the application starts up – the user can manually open such a layout (for example, from a menu), and can then close it again.
- ◆ Override (for test purposes) the above behaviors for specific users.

You can also define the display themes that end-users can select when they log in; for example:



Noir theme

or



Pastel theme

## Example configuration

Here is an example User Layout configuration:

```
<?xml version="1.0" encoding="UTF-8"?>

<layoutConfiguration
  xmlns="http://schema.caplin.com/CaplinTrader/layoutConfiguration"
  applicationName="novotrader"
  emptyLayoutName="New Layout"
  themes="noir, pastel">

  <layouts>
    <layout name="New Layout" src="blank_layout.xml" />
    <layout name="FX" defaultLayout="true" src="Layout_FX.xml" />
    <layout name="FI" defaultLayout="true" src="Layout_FI.xml" />
    <layout name="FIAnalysis" defaultLayout="true" src="Layout_FIAnalysis.xml" />
    <layout name="News" defaultLayout="false" src="Layout_News.xml" />
  </layouts>

  <users>
    <user userName="testusr1" lastName="Test1" firstName="Auser"
      layouts="FX, FI, FI Analysis, News" />
    <user userName="testusr2" lastName="Test2" firstName="Buser"
      themes="noir, test-theme" />
  </users>
</layoutConfiguration>
```

In this example:

- ◆ `<layoutConfiguration>` defines the name of the Caplin Trader application to which these User Layouts apply, the name given to empty layouts, and the themes available to application users.
- ◆ `<layouts>` contains a list of layout configurations that apply to all users of the application.
- ◆ `<users>` contains a list of users whose default layouts and themes override the settings in `<layouts>` and `<layoutConfiguration>`:
  - User "testusr1" has "News" as a default layout
  - User "testusr2" has a different set of themes.

**Tip:** The detailed arrangement of a layout as sets of panels is specified using XML (for example The XML in *Layout\_FX.xml*, as defined for the FX layout above). The document **Caplin Trader: Layout Configuration XML Reference** defines this layout XML.

**Note:** There must always be a layout file called *blank\_layout.xml* that defines the appearance of blank (empty) layouts. This file must be located in a directory called *layouts* that is immediately below the directory containing the User Layout configuration XML.

## 3 XML Reference information

This is the XML reference information for the User Layout configuration.

### 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 Ordering and nesting of 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 (*layoutConfiguration.rnc*) for definitive information on the ordering and nesting of tags.

For a description of each tag and its attributes, see [XML tag descriptions](#) .

#### <layoutConfiguration>

This is the outermost tag.

```
<layoutConfiguration>
  <layouts></layouts> (zero or one)
  <users></users> (zero or one)
</layoutConfiguration>
```

#### <layouts>

```
<layouts>
  <layout /> (one or more)
</layouts>
```

#### <users>

```
<users>
  <user /> (one or more)
</users>
```



### 3.3 XML tag descriptions

This section describes the XML tags that you can use to define User Layout configuration. The tags are arranged in alphabetical order by tag name.

#### Default attribute values

For each tag, the attributes you can use are listed and described in a table. The “Req?” column indicates whether the attribute is always required (“Y”) or is optional (“N”). If you do not supply an optional attribute then the default value is applied. If you do not supply an optional attribute and the default is '(none)', then not supplying the attribute can result in one of two behaviors – either the behavior is as specified in the description column of the table, or there is no effect on the behavior.

#### <layout>

<layout>

Specifies a layout that is available to the Caplin Trader application.

#### Attributes:

Name	Type	Default	Req?	Description
defaultLayout	boolean	false	N	This attribute specifies whether or not the defined layout is a default one. When defaultLayout is "true", the layout is always displayed when the Caplin Trader application starts up, and the user cannot subsequently close the layout. When defaultLayout is "false", the layout is not displayed by default; however, the user can manually open the layout (for example, from a menu), and can close it again. This attribute is ignored for any user who is named in a <user> tag where the layouts attribute is specified; in this case the layouts attribute of <user> determines whether or not the layout is displayed when the user logs on.
name	string	(none)	Y	The name of the layout (for example, "Foreign Exchange"). This name appears on the tab at the top of the rendered layout.
src	string	(none)	Y	The name of the XML file that defines the layout (for example, "Layout_FX.xml"). The name can include a directory path relative to the location of this User Layout configuration XML. A sub-directory called layouts is automatically prepended to the relative path. For example, assume this User Layout configuration XML is in a directory called /config. If the src attribute is set to "xxx/Layout_FX.xml", the path to the layout XML file is /config/layouts/xxx/Layout_FX.xml. If the src attribute is set to "Layout_FX.xml" (no relative path), the path to the layout XML file is /config/layouts/Layout_FX.xml.

## <layoutConfiguration>

<layoutConfiguration>

The outermost tag of the User Layout configuration XML.

### Attributes:

Name	Type	Default	Req?	Description
applicationName	string	(none)	Y	The name of the Caplin Trader application (for example, "novotrader").
emptyLayoutName	string	(none)	Y	The default name assigned to empty layouts when they are created (for example, "New Layout").
themes	string	(none)	Y	A comma separated list of theme names defining the themes available to users (for example, themes="theme1, theme2"). Each theme name must reference an existing theme. This attribute is ignored for any user who is named in a <user> tag where the theme attribute is specified; in this case the theme attribute of <user> determines which themes are available to that user.

## <layouts>

<layouts>

Contains a list of the layouts available to the Caplin Trader application (see <layout>).

**Attributes:** This tag has no attributes.

## <user>

<user>

Specifies a user of the Caplin Trader application, and the layouts and themes that the user can access. This tag should only be used for test purposes; see <users>.

### Attributes:

Name	Type	Default	Req?	Description
firstName	string	(none)	Y	The user's first name.
lastName	string	(none)	Y	The user's last name.
layouts	string	(none)	N	A comma separated list of layout names (for example, layouts="layout1, layout2"). This attribute specifies the default layouts for this user; each such layout is always displayed when the Caplin Trader application starts up, and the user cannot subsequently close the layout. Each entry in the list must match the name attribute of a <layout> tag, and it overrides the setting of the tag's defaultLayout attribute. When the layouts attribute is not specified, the defaultLayout settings of all the <layout> tags apply to this user.
theme	string	(none)	N	A comma separated list of theme names (for example, theme="theme1, theme2"). This attribute specifies the themes available to the user, which override the themes in the <layoutConfiguration> tag. Each theme name must reference an existing theme. When the theme attribute is not specified, the themes listed in the themes attribute of the <layoutConfiguration> tag apply to this user.
userName	string	(none)	Y	The user's Caplin Trader login user name.

## <users>

<users>

Contains a list of users who have access to particular layouts and themes (see <users>). This list should only be used for test purposes; for example, in automated acceptance tests where a defined set of "test" users have access to a defined subset of the available layouts and themes. In a production system, the configuration should not normally contain a <users> tag.

**Attributes:** This tag has no attributes.

## 4 Glossary of terms and acronyms

This section contains a glossary of terms, abbreviations, and acronyms relating to the Caplin Trader User Layout configuration.

Term	Definition
<b>Caplin Trader</b>	A web application framework for financial trading. An application constructed with Caplin Trader is a <b>Caplin Xaqua client</b> application.
<b>Caplin Trader application</b>	A <b>Caplin Xaqua client</b> that has been built using <b>Caplin Trader</b> .
<b>Caplin Xaqua</b>	A framework for building single-dealer platforms that enables banks to deliver multi-product trading direct to client desktops.
<b>Caplin Xaqua client</b>	A client desktop or web application that interfaces with <b>Caplin Xaqua</b> to deliver multi-product trading to end users.
<b>Display component</b>	A <b>GUI</b> component of <b>Caplin Trader</b> that can be rendered in a page on the screen.
<b>GUI</b>	<u>G</u> raphical <u>U</u> ser <u>I</u> nterface
<b>Panel</b>	A rectangular area on the page containing data and/or other <b>display components</b> .
<b>Layout</b>	An arrangement of <b>Panels</b> on a page. A page can contain several Layouts that are stacked on top of one another.
<b>Theme</b>	The overall appearance of a <b>Caplin Trader application</b> . The application can be implemented in a way that allows end-users to choose a theme when they log in.

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