

CAPLIN

# Caplin Trader 2.0

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## Catalog Of Documents

June 2010

CONFIDENTIAL

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# 1 Preface

## 1.1 What this document contains

This document lists the set of published documents about Caplin Trader 2.0. It gives a summary of what each document contains and who should read it.

Also see [About Caplin Trader documentation](#) 

## 1.2 Who should read this document

This document is intended for anyone who needs to locate information about Caplin Trader.

## 1.3 Related documents

### ◆ Caplin Xaqua: Catalog Of Documents

Lists the set of published documents about Caplin Xaqua. It gives a summary of what each document contains and who should read it.

## 1.4 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/>.

## 1.5 Acknowledgments

*Adobe® Reader* is a registered trademark of Adobe Systems Incorporated in the United States and/or other countries.

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## 2 About Caplin Trader documentation

### 2.1 Document lists in this catalog

The first part of this catalog lists the Caplin Trader documents by subject, organized into the groups listed below. Within each group, the document set is organized according to the document type (see [Document types](#)<sup>[3]</sup>), and the component or functional area to which the content of the document relates. The entry for each document looks like this:

| <i>Document Title</i>  | <i>Description</i>                                 | <i>Readership</i>   |
|--|--|---|
| <b>The title that appears on the cover page of the document.</b> | A brief description of what the document is about. | Who should read the document.<br>For example: <ul style="list-style-type: none"><li>◆ System Administrators</li><li>◆ Software Developers</li></ul> |

The document groups are:

- ◆ [Caplin Trader in general](#)<sup>[5]</sup>
- ◆ [Appearance and layout](#)<sup>[7]</sup>
- ◆ [Browser detection](#)<sup>[8]</sup>
- ◆ [Charts](#)<sup>[10]</sup>
- ◆ [Client connections \(StreamLink\)](#)<sup>[11]</sup>
- ◆ [Composite Display Component](#)<sup>[12]</sup>
- ◆ [Element Renderer](#)<sup>[13]</sup>
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- ◆ [Simple Form](#)<sup>[17]</sup>
- ◆ [Tiles](#)<sup>[18]</sup>
- ◆ [Trees](#)<sup>[19]</sup>
- ◆ [Web services](#)<sup>[20]</sup>

### 2.2 Finding documents by role and area of interest

If you want to find the documents that relate to your particular role and area of interest (for example, you are a Software Developer interested in configuring a Grid), look at the section [What documents should I read?](#)<sup>[22]</sup>

## 2.3 Document types

Information about Caplin Trader is provided in various document types:

| Document type           | Content  | Typical readership  |
|-------------------------|--|---|
| Release Highlights      | An overview of what is new in a particular release of a product.   | <ul style="list-style-type: none"> <li>◆ Anyone who needs to know what is new in a release.</li> </ul>  |
| Overview                | An overview (usually technical) of a component or functional area.   | <ul style="list-style-type: none"> <li>◆ Business Managers</li> <li>◆ Technical Managers</li> <li>◆ System Architects</li> <li>◆ System Administrators*</li> <li>◆ Software Developers</li> </ul> |
| Architecture            | Describes the architecture of a component.   | <ul style="list-style-type: none"> <li>◆ Technical Managers</li> <li>◆ System Architects</li> </ul>   |
| Installation Guide      | A practical guide to installing a component and getting it up and running.   | <ul style="list-style-type: none"> <li>◆ System Administrators*</li> </ul>  |
| “How To” Guide          | <p>A practical guide to that tells you how to use, configure, or customize the product.</p> <p>For example, how to use an API to customize a particular component.</p> <p>Read in conjunction with the accompanying Reference document, such as a Configuration Reference or an API Reference.</p> | <ul style="list-style-type: none"> <li>◆ System Administrators*</li> <li>◆ Software Developers</li> </ul>   |
| Configuration Reference | Reference documentation detailing all the configuration items for a component or functional area.  | <ul style="list-style-type: none"> <li>◆ System Administrators*</li> <li>◆ Software Developers</li> </ul>   |
| API Reference           | Reference documentation detailing an API.  | <ul style="list-style-type: none"> <li>◆ Software Developers</li> </ul>   |
| Technical Paper         | A document describing some technical feature or issue that is not covered in one of the other documents.   | <ul style="list-style-type: none"> <li>◆ Identified in the document preface.</li> </ul>   |

\* The System Administrator role includes people who are working in operational support roles.

## 2.4 Document naming and terminology

This catalog lists documents that explicitly refer to Caplin Trader. In documents that were issued before November 2009, what is now called “Caplin Trader” was called “Caplin Trader Client”.

When each pre-November 2009 Caplin Trader Client document is next updated, it will be renamed as a Caplin Trader document and its content will be modified accordingly.

Note: All Caplin Trader documents listed in this catalog have Caplin Trader in the title, even if they have not yet been renamed.

## 2.5 Caplin document formats

Caplin documents are 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.

The majority of documents (including this one) are available in all three of the above formats. API reference documentation is usually supplied only in HTML format, but for some API documents a *.CHM* file is also available. A few documents are only available as *.PDF* files.

### 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/>.

### 3 Caplin Trader in general

#### Overviews

| <i>Document Title</i>                   | <i>Description</i>  | <i>Readership</i>  |
|---|---|--|
| <b>Caplin Trader Release Highlights</b> | Gives an overview of what is new in a release of Caplin Trader. | Anyone who needs to know what is new in a particular release of Caplin Trader.   |
| <b>Caplin Trader Overview</b>           | A business and technical overview of Caplin Trader.             | Anyone who requires an overview of what Caplin Trader is and how it can be deployed in a financial asset trading system, including: <ul style="list-style-type: none"> <li>◆ Business Managers</li> <li>◆ Technical Managers</li> <li>◆ System Architects</li> <li>◆ System Administrators</li> <li>◆ Software Developers</li> </ul> |

#### Installation Guides

| <i>Document Title</i>                          | <i>Description</i>  | <i>Readership</i>  |
|--|---|--|
| <b>Installing Caplin Trader for Evaluation</b> | Describes how to install Caplin Trader on a Linux server for evaluation purposes. It accompanies the Caplin Trader Evaluation installation package. | <ul style="list-style-type: none"> <li>◆ System Administrators who need to install the evaluation version of Caplin Trader.</li> </ul> |

#### How To Guides

| <i>Document Title</i>                                 | <i>Description</i>   | <i>Readership</i>  |
|---|--|--|
| <b>How To Troubleshoot Client Connection Problems</b> | <p>Describes some typical problems that Caplin Trader users might experience when Caplin Trader is attempting to communicate with the Caplin Trader servers, such as the Application Server and Caplin Liberator.</p> <p>It describes the symptoms of each problem, lists the possible diagnoses, and gives guidance on possible solutions to the problem according to the applicable diagnosis.</p> | <p>You should read this document if you are providing technical support for a production deployment of Caplin Trader.</p> <p>If you are about to deploy Caplin Trader for the first time, you should read the relevant parts of the document to avoid a number of common pitfalls.</p> |



**Configuration Guides**

| <i>Document Title</i>                                     | <i>Description</i>   | <i>Readership</i>   |
|---|--|---|
| <b>Configuring Caplin Trader to use the Oracle® RDBMS</b> | A guide to configuring Caplin Trader to use an Oracle database instead of the MySQL database that is supplied with the Reference Implementation. | <ul style="list-style-type: none"><li>◆ Software Developers</li><li>◆ Database Administrators</li></ul> |

## 4 Appearance and layout

### How To Guides

| <i>Document Title</i>                            | <i>Description</i>   | <i>Readership</i>   |
|--|--|---|
| <b>Caplin Trader: Customizing the Appearance</b> | Describes how to configure the on-screen layout and 'look and feel' of Caplin Trader.<br><br>Includes basic information about using the Layout Manager.  | <ul style="list-style-type: none"> <li>◆ System Administrators</li> <li>◆ Software Developers</li> </ul> who need to configure the appearance of Caplin Trader.             |
| <b>Caplin Trader: Customizing the Content</b>    | Describes how to add content to the layout components of a Caplin Trader application, and then describes how to add custom components. Includes information on how to add external Flash or Flex content and how to add Grids. | <ul style="list-style-type: none"> <li>◆ System Administrators</li> <li>◆ Software Developers</li> </ul> who need to configure the content and appearance of Caplin Trader. |

### Configuration Reference

| <i>Document Title</i>                                    | <i>Description</i>  | <i>Readership</i>   |
|--|---|---|
| <b>Caplin Trader: Layout Configuration XML Reference</b> | Describes the XML-based configuration that defines the layout of Caplin Trader, and other aspects of its appearance, to the Layout Manager. | <ul style="list-style-type: none"> <li>◆ System Administrators</li> <li>◆ Software Developers</li> </ul> who need to configure the appearance of Caplin Trader. |

## 5 Browser detection

### Configuration Reference

| <i>Document Title</i>   | <i>Description</i>   | <i>Readership</i>   |
|---|--|---|
| <b>Caplin Trader: Browser Detection Configuration XML Reference</b> | Describes the XML-based configuration that determines how Caplin Trader detects and validates the browser in which it is running. It also describes the XML-based configuration that defines the browser support messages displayed to the end user. | <ul style="list-style-type: none"><li>◆ System Administrators</li><li>◆ Software Developers</li></ul> who need to modify the list of supported browsers in Caplin Trader and/or change the text of the messages displayed when unsupported browsers are detected. |

## 6 Deployment

### How To Guides

| <i>Document Title</i>  | <i>Description</i>   | <i>Readership</i>   |
|--|--|---|
| <b>Caplin Trader: How To Deploy Caplin Trader Applications</b> | Contains information on how to deploy for live operation an Ajax-based client application that has been built using the Caplin Trader framework. | <ul style="list-style-type: none"><li>◆ System Administrators</li><li>◆ Software Developers</li></ul> who are responsible for deploying a new version of a Caplin Trader application in a live environment. |

## 7 Charts

### Configuration Reference

| <i>Document Title</i>  | <i>Description</i>   | <i>Readership</i>  |
|--|--|--|
| <b>Caplin Trader: Chart Configuration XML Reference (BETA)</b> | Describes the XML-based configuration that defines the layout and functionality of the Chart Display Component in Caplin Trader. | ◆ Software Developers who need to compose display components in Caplin Trader. |

## 8 Client connections (StreamLink)

### Overviews

| <i>Document Title</i>                         | <i>Description</i>   | <i>Readership</i>   |
|---|--|---|
| <b>StreamLink Overview</b><br>(5.0 and later) | A technical overview of Caplin StreamLink.<br><br>Applies to StreamLink 5.0 and above (StreamLink.NET and StreamLink for Silverlight). | <ul style="list-style-type: none"> <li>◆ Technical Managers</li> <li>◆ System Architects</li> <li>◆ System Administrators</li> <li>◆ Software Developers</li> </ul> |

### API Reference

| <i>Document Title</i>                             | <i>Description</i>   | <i>Readership</i>  |
|---|--|--|
| <b>StreamLink for Browsers:<br/>API Reference</b> | Documents the JavaScript libraries that allow web pages to exchange real-time financial data and trade messages with Caplin Xaqua. | <ul style="list-style-type: none"> <li>◆ System Administrators</li> <li>◆ Software Developers</li> </ul> <p>who need to use and/or customize the communication layer of Caplin Trader.</p> |

## 9 Composite Display Component

### How To Guides

| <i>Document Title</i>  | <i>Description</i>  | <i>Readership</i>  |
|--|---|--|
| <b>Caplin Trader: How To Create A Charting Component (Market Overview) BETA</b>  | Explains how to group a Chart with other display components using the Caplin Trader Composite Component. It refers to the 'Market Overview' historical data component in the Caplin Trader Reference Implementation.                            | ◆ Software Developers who want to group a Chart with other display components using the Caplin Trader Composite Component. |
| <b>Caplin Trader: How To Create A Charting Component (Rich Cheap Curve) BETA</b> | Explains how to group a chart with other display components using the Caplin Trader Composite Component. It refers to the 'Relative Value Analysis' (Rich Cheap Curve) historical data component in the Caplin Trader Reference Implementation. | ◆ Software Developers who want to group a Chart with other display components using the Caplin Trader Composite Component. |
| <b>Caplin Trader: How To Create A Product Finder Composite Component</b>         | Explains how to create a product finder using the Caplin Trader Composite Component. It refers to the product finder (Bond Finder) in the Caplin Trader Reference Implementation.   | ◆ Software Developers who want to create a product finder using the Caplin Trader Composite Component.                     |

### Configuration Reference

| <i>Document Title</i>   | <i>Description</i>   | <i>Readership</i>  |
|---|--|--|
| <b>Caplin Trader: Composite Component Configuration XML Reference</b> | Describes the XML-based configuration that defines the layout and functionality of the composite display component in Caplin Trader. | ◆ Software Developers who need to compose display components in Caplin Trader. |

## 10 Element Renderer

### How To Guides

| <i>Document Title</i>   | <i>Description</i>  | <i>Readership</i>  |
|---|---|--|
| <b>Caplin Trader: How To Create And Use Element Renderers</b> | Describes how to create and use Element Renderers in a Caplin Trader application. | ◆ Software Developers who want to create Element Renderers in Caplin Trader. |

### Configuration Reference

| <i>Document Title</i>  | <i>Description</i>   | <i>Readership</i>  |
|--|--|--|
| <b>Caplin Trader: Element Renderer Configuration XML Reference</b> | Describes the XML-based configuration that defines Element Renderers in Caplin Trader. | ◆ Software Developers who need to specify the formatting, styling, or user interaction of display controls in Caplin Trader. |



## 11 Extending Caplin Trader

### API Reference

| <i>Document Title</i>                   | <i>Description</i>  | <i>Readership</i>  |
|---|---|--|
| <b>Caplin Trader: API Specification</b> | Documents the JavaScript libraries that allow developers to extend Caplin Trader by writing custom JavaScript code. | ◆ Software Developers who need to extend Caplin Trader using JavaScript. |

## 12 Grids

### Configuration Reference

| <i>Document Title</i>                                  | <i>Description</i>   | <i>Readership</i>  |
|--|--|--|
| <b>Caplin Trader: Grid Configuration XML Reference</b> | Describes the XML-based configuration that defines the layout and functionality of Grids displayed in Caplin Trader. | ◆ Software Developers who need to configure Grids for Caplin Trader.<br>(See also <b>Caplin Trader: Customizing the Content</b> ). |

## 13 Permissioning

### How To Guides

| <i>Document Title</i>  | <i>Description</i>  | <i>Readership</i>  |
|--|---|--|
| <b>Caplin Trader: How To Add Permissioning At The Client</b> | Describes how to add permissioning to Caplin Trader so that display components behave in accordance with the permissions of the logged in user. | <ul style="list-style-type: none"> <li>◆ System Architects</li> <li>◆ Software Developers</li> </ul> who want to add or modify permissioning in Caplin Trader. |

### Configuration Reference

| <i>Document Title</i>   | <i>Description</i>   | <i>Readership</i>   |
|---|--|---|
| <b>Caplin Trader: Permissioning Configuration XML Reference</b> | Describes the XML-based permissioning configuration used in Caplin Trader version 1.5.0 and later. | <ul style="list-style-type: none"> <li>◆ Software Developers who need to configure permissioning in Caplin Trader.</li> </ul> |

**Tip:** You may also find the Permissioning documents for Caplin Xaqua useful (see **Caplin Xaqua: Catalog Of Documents**).

## 14 Simple Forms

### Configuration Reference

| <i>Document Title</i>   | <i>Description</i>   | <i>Readership</i>   |
|---|--|---|
| <b>Caplin Trader: Simple Form Component Configuration Reference</b> | Describes the XML and XHTML based configuration that defines a Simple Form display component in Caplin Trader. | ◆ Software Developers who need to put Simple Form display components in Caplin Trader, so that end-users can enter information into a displayed page. |

## 15 Tiles

### Configuration Reference

| <i>Document Title</i>                                  | <i>Description</i>  | <i>Readership</i>   |
|--|---|---|
| <b>Caplin Trader: Tile Configuration XML Reference</b> | Describes the XML-based configuration that defines the layout and functionality of Tile views displayed in Caplin Trader. | ◆ Software Developers who need to configure Tile views for Caplin Trader. |

## 16 Trees

### Configuration Reference

| <i>Document Title</i>                                       | <i>Description</i>  | <i>Readership</i>   |
|---|---|---|
| <b>Caplin Trader: Tree View Configuration XML Reference</b> | Describes the XML-based configuration that defines the layout and functionality of Tree views displayed in Caplin Trader. | ◆ Software Developers who need to configure Tree views for Caplin Trader. |

### API Reference

| <i>Document Title</i>            | <i>Description</i>  | <i>Readership</i>  |
|----------------------------------|---|--|
| <b>Ext JS: API Specification</b> | Documents the Ext JS cross-browser JavaScript library that renders Trees in a layout. | ◆ Software Developers who need to configure Tree views for Caplin Trader using Ext JS API configuration options. |

## 17 Web services

### Configuration Reference

| <i>Document Title</i>  | <i>Description</i>   | <i>Readership</i>   |
|--|--|---|
| <b>Caplin Trader: Web Service Chart Data Format Reference (BETA)</b> | Caplin Trader can display data from a web service in a Chart or Grid. This document describes how the web service data for a Chart must be structured. | ◆ Software Developers who want to develop a web service that will return data to Caplin Trader so that the data can be presented in a Chart display component |
| <b>Caplin Trader: Web Service Grid Data Format Reference (BETA)</b>  | Caplin Trader can display data from a web service in a Chart or Grid. This document describes how web service data for a Grid must be structured.      | ◆ Software Developers who want to develop a web service that will return data to Caplin Trader so that the data can be presented in a Grid display component  |

## 18 Caplin Xaqua documentation

Caplin Trader uses various Caplin Xaqua components, such as Caplin Liberator and Caplin Transformer. In particular, the reference implementation of Caplin Trader uses Caplin Liberator, Caplin Transformer, and DataSource for Reuters.

For information about the available documentation for these components refer to the **Caplin Xaqua: Catalog Of Documents**.



## 19 What documents should I read?

The following sections allow you to look for the documents that relate to your particular role and area of interest:

- ◆ [Business Manager or E-commerce Manager](#) <sup>[ 23 ]</sup>
- ◆ [Technical Manager or System Architect](#) <sup>[ 23 ]</sup>
- ◆ [Software Developer](#) <sup>[ 24 ]</sup>
- ◆ [System Administrator/Operations](#) <sup>[ 28 ]</sup>

## 19.1 Business Manager or E-commerce Manager

If you are a Business Manager or E-commerce Manager, you will find the following documents useful:

- ◆ **Caplin Trader: Overview**
- ◆ **Caplin Trader Release Highlights**

## 19.2 Technical Manager or System Architect

If you are a Technical Manager or System Architect, and are new to Caplin Trader, you will find the following introductory documents useful:

- ◆ **Caplin Trader: Overview**
- ◆ **Caplin Trader Release Highlights**

### Other areas of interest

**Tip:** For more detailed information on these subjects, see "Other areas of interest" in [Software Developer](#) <sup>24</sup>.

**Tip:** For information about integrating Caplin Xaqua with an existing or external Trading or Permissioning system, see the **Caplin Xaqua: Catalog Of Documents**.

- ◆ How do I connect Caplin Trader to Caplin Xaqua?
  - Read about Caplin StreamLink in the **Caplin StreamLink 5.0 Overview**.  
Sections 1–5 of this document apply to StreamLink versions 5.x *and* 4.x; they explain StreamLink concepts and functionality.
  - For detailed information about StreamLink for Browsers (the StreamLink library used by Caplin Trader), see the "Introduction" section of the **StreamLink for Browsers API Reference**. This section includes information about the failover algorithms used by StreamLink for Browsers.
- ◆ I want to know how Caplin Trader can be tailored to match the permissions of the currently logged in user.
  - Read **Caplin Trader: How To Add Permissioning At The Client**.
  - Read **Caplin Xaqua: Permissioning Overview And Concepts**.  
This Caplin Xaqua document introduces permissioning concepts and terms, and shows the permissioning components of the Caplin Xaqua architecture.
- ◆ I want to know how Layouts are defined and managed in Caplin Trader.
  - Read "Layout Concepts" in the document **Caplin Trader: Customizing The Appearance**.

## 19.3 Software Developer

If you are a Software Developer who will be working with Caplin Trader, and you are new to Caplin Trader, you will find the following introductory documents useful:

- ◆ **Caplin Trader: Overview**
- ◆ **Caplin Trader Release Highlights**
- ◆ You should also read the **Release Notes** for the version of Caplin Trader that you will be working with.

### Other areas of interest

- ◆ [Changing the appearance and layout](#) <sup>[24]</sup>
- ◆ [Changing the database used by Caplin Trader](#) <sup>[25]</sup>
- ◆ [Connecting to Caplin Xaqua](#) <sup>[25]</sup>
- ◆ [Detecting supported browsers](#) <sup>[25]</sup>
- ◆ [Deploying Caplin Trader applications](#) <sup>[25]</sup>
- ◆ [Displaying data from a web service](#) <sup>[25]</sup>
- ◆ [Extending the Caplin Trader framework](#) <sup>[25]</sup>
- ◆ [Grouping display components \(the Composite Component\)](#) <sup>[26]</sup>
- ◆ [Matching the permissions of the logged in user](#) <sup>[26]</sup>
- ◆ [Troubleshooting client connection problems](#) <sup>[26]</sup>
- ◆ [Using Display components](#) <sup>[26]</sup>

**Tip:** For information about integrating Caplin Xaqua with an existing or external Trading or Permissioning system, see the **Caplin Xaqua: Catalog Of Documents**.

### Changing the appearance and layout

- ◆ I want to change the appearance of Caplin Trader.
  - Read **Caplin Trader: Customizing the Appearance**.
  - Refer to the **Caplin Trader: Layout Configuration XML Reference**
- ◆ I want to add custom content to Caplin Trader (such as simple HTML or a page from a web site).
  - Read **Caplin Trader: Customizing the Content**.

## Changing the database used by Caplin Trader

- ◆ I want to configure Caplin Trader to use an Oracle database instead of MySQL.
  - Read **Configuring Caplin Trader to use the Oracle® RDBMS**.

## Connecting to Caplin Xaqua

- ◆ I want to configure the interface between Caplin Trader and Caplin Xaqua
  - You can familiarize yourself with Caplin StreamLink by reading the **Caplin StreamLink 5.0 Overview**.  
Sections 1–5 of this document explain StreamLink concepts and functionality.
  - Then refer to the **StreamLink for Browsers API Reference** (older versions are called **Caplin SL4B SDK**).

## Detecting supported browsers

- ◆ I want to change the list of browsers that my version of Caplin Trader supports.
  - Refer to the **Caplin Trader: Browser Detection Configuration XML Reference**.

## Deploying Caplin Trader applications

- ◆ I want to deploy my Caplin Trader application for live operation.
  - Refer to **How To Deploy Caplin Trader Applications**.
  - Also see **How To Troubleshoot Client Connection Problems**.

## Displaying data from a web service

- ◆ I want to display data from a web service in a Chart.
  - Refer to the **Caplin Trader: Web Service Chart Data Format Reference**.
  - Refer to the **Caplin Trader: Chart Configuration XML Reference**.
- ◆ I want to display data from a web service in a Grid.
  - Refer to the **Caplin Trader: Web Service Grid Data Format Reference**.
  - Refer to the **Caplin Trader: Grid Configuration XML Reference**.

## Extending the Caplin Trader framework

- ◆ I want to extend the Caplin Trader framework by writing JavaScript code.
  - Refer to the **Caplin Trader: API Specification**.

## Grouping display components (the Composite Component)

- ◆ I want to group display components together so that the information displayed by one component is controlled from another display component. For example, I want the information displayed in a Grid to be determined by what the end user selects in a Tree structure.
  - Refer to the **Caplin Trader: Composite Component Configuration XML Reference**.
  
- ◆ I want to create a "market overview" for a currency by grouping together Charts, Grids, and a Simple Form inside a Composite Component.
  - Read **Caplin Trader: How To Create A Charting Component (Market Overview)**.
  
- ◆ I want to create a "relative value analysis" (Rich Cheap Curve) for bonds by grouping together Charts, Grids, and a Simple Form inside a Composite Component.
  - Read **Caplin Trader: How To Create A Charting Component (Rich Cheap Curve)**.
  
- ◆ I want to create a product finder that allows the end user to select and filter the instruments that are displayed in a Grid.
  - Read **Caplin Trader: How To Create A Product Finder Composite Component**.

## Matching the permissions of the logged in user

- ◆ I want to tailor Caplin Trader to match the permissions of the logged in user.
  - Read **Caplin Trader: How To Add Permissioning At The Client**.
  - Refer to the **Caplin Trader: Permissioning Configuration XML Reference**.

## Troubleshooting client connection problems

- ◆ I want to read about typical client connection problems that end users of Caplin Trader might encounter, and get guidance on how to prevent them happening.
  - Read **Caplin Trader: How To Troubleshoot Client Connection Problems**.

## Using Display components

- ◆ I want to display information in a Chart.
  - Refer to the **Caplin Trader: Chart Configuration XML Reference**.
  - Refer to the **Caplin Trader: Web Service Chart Data Format Reference**.
  - Read **Caplin Trader: How To Create A Charting Component (Market Overview)**.
  - Read **Caplin Trader: How To Create A Charting Component (Rich Cheap Curve)**.

- ◆ I want to display information in a Grid.
  - Refer to the **Caplin Trader: Grid Configuration XML Reference**.
  - Read "Adding a Grid" in the document **Caplin Trader: Customizing the Content**.
  
- ◆ I want to format and style the data that is displayed in the cells of a Grid (for example, format the number of decimal places or apply an underlined or bold style)
  - Refer to the **Caplin Trader: Element Renderer Configuration XML Reference**.
  
- ◆ I want to specify an event handler that responds to events in a Grid (for example, that opens a trade ticket when the end user clicks an indicative price).
  - Refer to the **Caplin Trader: Element Renderer Configuration XML Reference**.
  
- ◆ I want to display information in a Simple Form.
  - Refer to the **Caplin Trader: Simple Form Component Configuration Reference**.
  
- ◆ I want to display information in a Tile.
  - Refer to the **Caplin Trader: Tile Configuration XML Reference**.
  
- ◆ I want to display information in a Tree structure.
  - Refer to the **Caplin Trader: Tree View Configuration XML Reference**.

## 19.4 System Administrator/Operations

If you are a Software Developer who will be working with Caplin Trader, and you are new to Caplin Trader, you will find the following introductory documents useful:

- ◆ **Caplin Trader: Overview**
- ◆ **Caplin Trader Release Highlights**
- ◆ You should also read the **Release Notes** for the version of Caplin Trader that you will be working with.

### Other areas of interest

- ◆ [Changing the appearance and layout](#) <sup>[28]</sup>
- ◆ [Changing the database used by Caplin Trader](#) <sup>[28]</sup>
- ◆ [Connecting to Caplin Xaqua](#) <sup>[29]</sup>
- ◆ [Detecting supported browsers](#) <sup>[29]</sup>
- ◆ [Deploying Caplin Trader applications](#) <sup>[29]</sup>
- ◆ [Installing the evaluation version of Caplin Trader](#) <sup>[29]</sup>
- ◆ [Troubleshooting client connection problems](#) <sup>[29]</sup>

### Changing the appearance and layout

- ◆ I want to change the appearance of Caplin Trader.
  - Read **Caplin Trader: Customizing the Appearance**.
  - Refer to the **Caplin Trader: Layout Configuration XML Reference**
- ◆ I want to add custom content to Caplin Trader (such as simple HTML or a page from a web site).
  - Read **Caplin Trader: Customizing the Content**.

### Changing the database used by Caplin Trader

- ◆ I want to configure Caplin Trader to use an Oracle database instead of MySQL.
  - Read **Configuring Caplin Trader to use the Oracle® RDBMS**.

## Connecting to Caplin Xaqua

- ◆ I want to configure the interface between Caplin Trader and Caplin Xaqua
  - You can familiarize yourself with Caplin StreamLink by reading the **Caplin StreamLink 5.0 Overview**.  
Sections 1–5 of this document explain StreamLink concepts and functionality.
  - Then refer to the **StreamLink for Browsers API Reference** (older versions are called **Caplin SL4B SDK**).

## Detecting supported browsers

- ◆ I want to change the list of browsers that my version of Caplin Trader supports.
  - Refer to the **Caplin Trader: Browser Detection Configuration XML Reference**.

## Deploying Caplin Trader applications

- ◆ I want to deploy my Caplin Trader application for live operation.
  - Refer to **How To Deploy Caplin Trader Applications**.
  - Also see **How To Troubleshoot Client Connection Problems**.

## Installing the evaluation version of Caplin Trader

- ◆ I want to install the evaluation version of Caplin Trader.
  - Read **Caplin Trader: Installing Caplin Trader for Evaluation**.

## Troubleshooting client connection problems

- ◆ I need to fix some client connection problems that end users of Caplin Trader are experiencing.
  - Read **Caplin Trader: How To Troubleshoot Client Connection Problems**.



## 20 Change history

This is the history of changes to this documentation catalog.

| Catalog Version/Date/<br>Release # | Changes   |
|------------------------------------|---|
| 1.0 Feb 2008 Release 1             | First release of the catalog.   |
| 1.1 Mar 2008 Release 1             | <ul style="list-style-type: none"> <li>◆ New document added:<br/><b>Caplin Trader Client: Customizing the Content.</b></li> <li>◆ Document withdrawn:<br/><b>Integrating External Flash/Flex Content into Caplin Trader.</b><br/>Information on Integrating External Flash/Flex Content is now in the new document <b>Caplin Trader Client: Customizing the Content.</b></li> </ul> |
| 1.2 Jun 2008 Release 1             | <ul style="list-style-type: none"> <li>◆ New document added:<br/><b>Caplin Trader: Integrating with a Permissioning System.</b></li> </ul>  |
| 1.2 Aug 2008 Release 1             | <ul style="list-style-type: none"> <li>◆ New document added:<br/><b>The Caplin Trader Development Support Package.</b></li> </ul>   |
| 1.2 Aug 2008 Release 2             | <ul style="list-style-type: none"> <li>◆ New document added <b>Caplin Trader Development Suite</b>, which replaces <b>The Caplin Trader Development Support Package.</b></li> </ul>   |
| 1.3 Aug 2008 Release 1             | <ul style="list-style-type: none"> <li>◆ New documents added:<br/><b>Caplin Trader Release Highlights</b></li> <li><b>Caplin Trader Client: Tree View Configuration XML Reference</b></li> <li><b>Caplin Trader Client: Tile Configuration XML Reference.</b></li> </ul>  |
| 1.3 Sep 2008 Release 1             | <ul style="list-style-type: none"> <li>◆ New documents added:<br/><b>Caplin Trader Client: API Specification</b></li> <li><b>Trading DataSource: API Specification</b></li> <li><b>Permissioning DataSource: API Specification</b></li> <li><b>StreamLink for Browsers: API Specification</b></li> <li><b>Ext JS: API Specification.</b></li> </ul>                                 |

|                                      |  |
|--------------------------------------|--|
| <p><b>1.3 Jan 2009</b> Release 1</p> | <ul style="list-style-type: none"> <li>◆ Catalog reorganized and published for the first time in HTML and .CHM formats in addition to .PDF</li> <li>◆ New documents added:<br/> <b>Caplin Trader: Permissioning Overview And Concepts</b><br/><br/> <b>Caplin Trader: Installing Permissioning Components</b><br/><br/> <b>Caplin Trader: How To Create A Permissioning DataSource Adapter</b><br/><br/> <b>Permissioning DataSource: API Specification</b><br/><br/> <b>Caplin Trader Client: Composite Component Configuration XML Reference</b><br/><br/> <b>Caplin Trader Client: Simple Form Component Configuration Reference</b><br/><br/> <b>Caplin Trader Client: How To Add Permissioning At The Client</b></li> </ul> |
| <p><b>1.3 Feb 2009</b> Release 1</p> | <ul style="list-style-type: none"> <li>◆ New document added:<br/> <b>Caplin Trader Client: How To Create A Product Finder Composite Component</b></li> </ul>   |
| <p><b>1.4 Mar 2009</b> Release 1</p> | <ul style="list-style-type: none"> <li>◆ Document name changes:<br/> <b>Caplin Trader XML Configuration Reference</b> now called<br/> <b>Caplin Trader Client: Layout Configuration XML Reference</b><br/><br/> <b>Caplin Trader Trade Model XML Reference</b> now called<br/> <b>Caplin Trader Trade Model Configuration XML Reference</b></li> </ul>   |
| <p><b>1.4 Jul 2009</b> Release 1</p> | <ul style="list-style-type: none"> <li>◆ New document added:<br/> <b>Caplin Trader Client: Browser Detection Configuration XML Reference</b></li> </ul>  |
| <p><b>1.4 Aug 2009</b> Release 1</p> | <ul style="list-style-type: none"> <li>◆ New documents added:<br/> <b>Caplin Trader Client: How To Create A Charting Component (Market Overview) DRAFT</b><br/><br/> <b>Caplin Trader Client: How To Create A Charting Component (Rich Cheap Curve) DRAFT</b><br/><br/> <b>Caplin Trader Client: Chart Configuration XML Reference (DRAFT)</b><br/><br/> <b>Caplin Trader Client: Web Service Chart Data Format Reference (DRAFT)</b><br/><br/> <b>Caplin Trader Client: Web Service Grid Data Format Reference (DRAFT)</b></li> </ul>   |
| <p><b>1.5 Oct 2009</b> Release 1</p> | <ul style="list-style-type: none"> <li>◆ New documents added:<br/> <b>Caplin Trader: How To Troubleshoot Client Connection Problems</b><br/><br/> <b>Caplin Trader Client: Element Renderer Configuration XML Reference</b></li> </ul>   |
| <p><b>1.5 May 2010</b> Release 1</p> | <ul style="list-style-type: none"> <li>◆ New document added:<br/> <b>Caplin Trader: How To Create And Use Element Renderers</b></li> </ul>   |

|                                |   |
|--------------------------------|---|
|                                | <ul style="list-style-type: none"><li>◆ Document name change:<br/><b>Caplin Trader Client: Grid Configuration XML Reference</b> now called<br/><b>Caplin Trader: Grid Configuration XML Reference</b></li></ul>   |
| <b>2.0 June 2010</b> Release 1 | <ul style="list-style-type: none"><li>◆ Catalog brought in line with Caplin Xaqua ("Caplin Trader Client" changed to "Caplin Trader" and documents that are now Caplin Xaqua documents removed from this catalog).</li><li>◆ New section <a href="#">What documents should I read?</a> <sup>22</sup> added.</li><li>◆ New documents added:<br/><b>Caplin Trader: How To Deploy Caplin Trader Applications</b></li></ul> |

## 21 Glossary of terms and acronyms

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

| <u>Term</u>                      | <u>Definition</u>  |
|----------------------------------|--|
| <b>Ajax</b>                      | <u>A</u> ssynchronous <u>J</u> avaScript and <u>X</u> ML.<br>A combination of Web technologies used to implement interactive Web clients.  |
| <b>API</b>                       | <u>A</u> pplication <u>P</u> rogramming <u>I</u> nterface.   |
| <b>Caplin Liberator</b>          | Caplin Liberator is a real-time financial internet hub (server) that delivers trade messages and market data to and from subscribers over any network.   |
| <b>Caplin Trader</b>             | A <b>Rich Internet Application</b> framework for constructing <b>Caplin Xaqua client</b> applications for browser-based trading. It includes a comprehensive set of trading <b>GUI</b> components.<br>Caplin Trader was formerly called "Caplin Trader Client".            |
| <b>Caplin Transformer</b>        | Caplin Transformer is an event-driven real-time business rules engine.   |
| <b>Caplin Xaqua</b>              | A single-dealer platform that enables banks to deliver multi-product trading direct to client desktops.<br>Caplin Xaqua was formerly called "the Caplin Platform".   |
| <b>Caplin Xaqua client</b>       | A client desktop application that interfaces with <b>Caplin Xaqua</b> to deliver multi-product trading to end users. <b>Caplin Trader</b> is a framework for constructing browser-based Caplin Xaqua client applications.  |
| <b>Chart</b>                     | A <b>display component</b> that represents data visually.  |
| <b>Composite Component</b>       | A <b>display component</b> that groups together other display components.  |
| <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>ExtJS</b>                     | A Javascript library that is used by <b>Caplin Trader</b> to render <b>Trees</b> in a layout.  |
| <b>Grid</b>                      | A <b>display component</b> that displays data in a tabular format.   |
| <b>GUI</b>                       | <u>G</u> raphical <u>U</u> ser <u>I</u> nterface.  |
| <b>Layout Manager</b>            | The framework that controls the on-screen layout and 'look and feel' of a Caplin Trader application through static XML configuration and dynamic user interaction.   |
| <b>Permissioning</b>             | The process of determining the access rights that a user has to resources, such as data and functionality provided by <b>Caplin Xaqua</b> .  |
| <b>Rich Internet Application</b> | A web application, such as an application implemented using <b>Caplin Trader</b> , that has the features and functions of a desktop application, but which does not need to be installed on the client platform. Rich Internet Applications typically run in web browsers. |

| <u>Term</u>                       | <u>Definition</u>   |
|-----------------------------------|---|
| <b>RTTP</b>                       | <u>Real Time Text Protocol</u> .<br>Caplin's protocol for streaming real-time financial data from <b>Caplin Liberator</b> servers to client applications, and for transmitting trade messages between clients and Liberator in both directions. |
| <b>SDK</b>                        | <u>Software Development Kit</u> .   |
| <b>Simple Form</b>                | A <b>display component</b> that allows end users to enter information into a page.  |
| <b>StreamLink</b>                 | The StreamLink libraries connect client applications to <b>Caplin Liberator</b> via the <b>RTTP</b> protocol. They provide an object oriented API that gives access to RTTP functionality.  |
| <b>StreamLink for Browsers</b>    | StreamLink for Browsers is a JavaScript implementation of <b>StreamLink</b> that runs in Web browsers. It allows <b>Ajax</b> applications to communicate with <b>Caplin Liberator</b> .   |
| <b>StreamLink.NET</b>             | StreamLink.NET is a Microsoft .NET implementation of <b>StreamLink</b> . It allows .NET applications to communicate with <b>Caplin Liberator</b> .  |
| <b>StreamLink for Silverlight</b> | StreamLink for Silverlight is a Microsoft Silverlight™ implementation of <b>StreamLink</b> . It allows Silverlight applications to communicate with <b>Caplin Liberator</b> .   |
| <b>Tile</b>                       | A <b>display component</b> that displays information in a square or rectangular area of the page. The most typical implementation of a Tile is the <b>Trade Tile</b> .  |
| <b>Trade Tile</b>                 | A <b>display component</b> that allows the user to trade on a product with a single mouse click.  |
| <b>Tree</b>                       | A <b>display component</b> that displays information in a tree-like structure.  |
| <b>XML</b>                        | <u>Extensible Markup Language</u> .   |

## Contact Us

Caplin Systems Ltd  
Triton Court  
14 Finsbury Square  
London EC2A 1BR  
Telephone: +44 20 7826 9600  
Fax: +44 20 7826 9610  
[www.caplin.com](http://www.caplin.com)

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