

Orbit

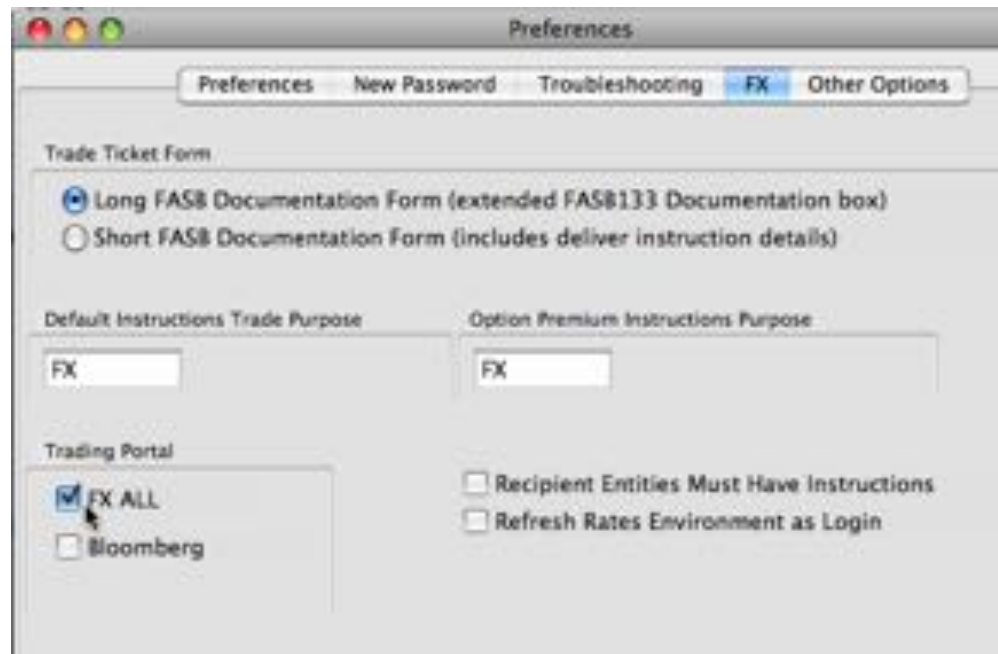
Setup a User to use FX Trading Portals

FX Trading Portals



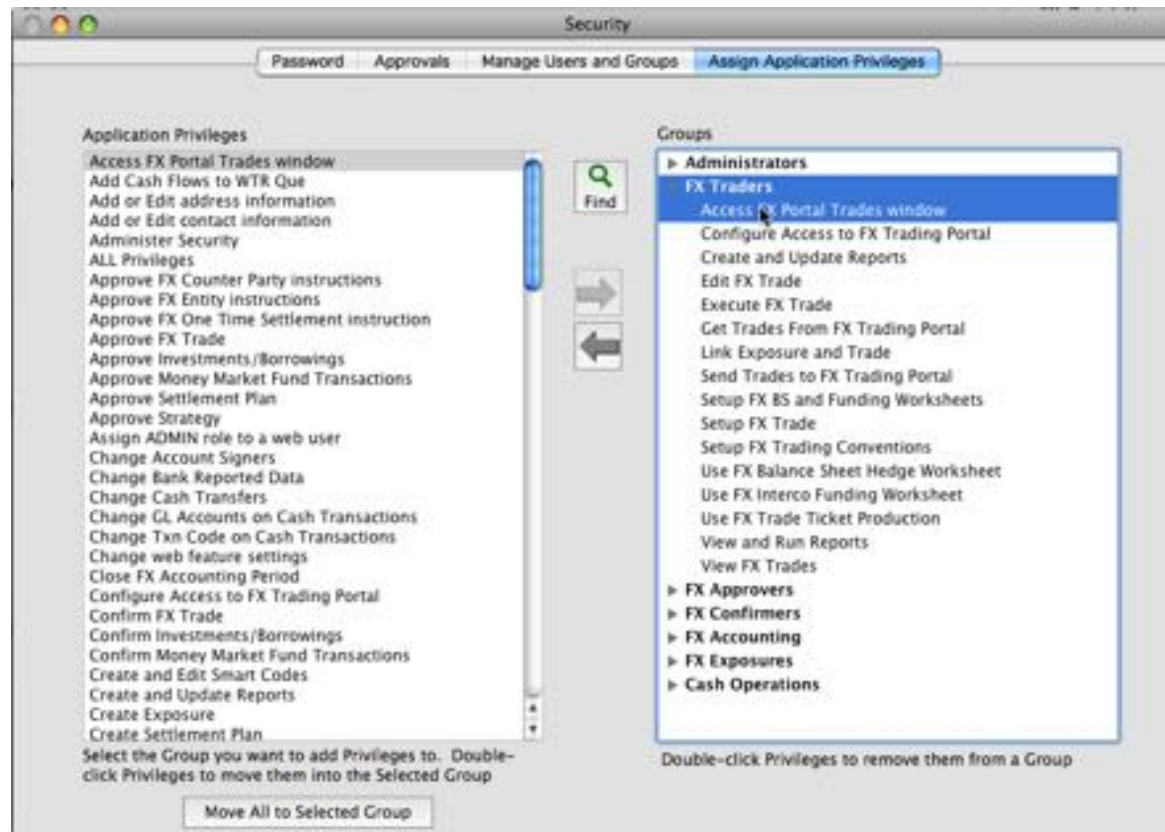
- Trading Portals are activated through the “User Preferences”
- Trading Portals only need to be activated once

FX Trading Portals



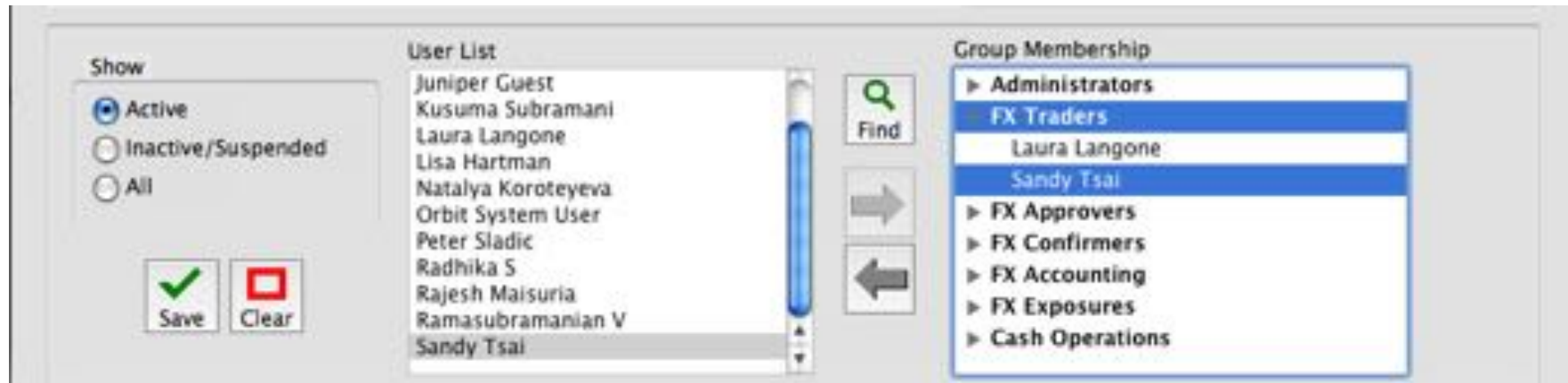
- Go to the “FX” tab of the Preferences window
- Check the Portal you are using
- Currently Orbit allows a client access to one portal
- In the future Orbit will allow a client to trade off of 2 different portals

FX Trading Portals



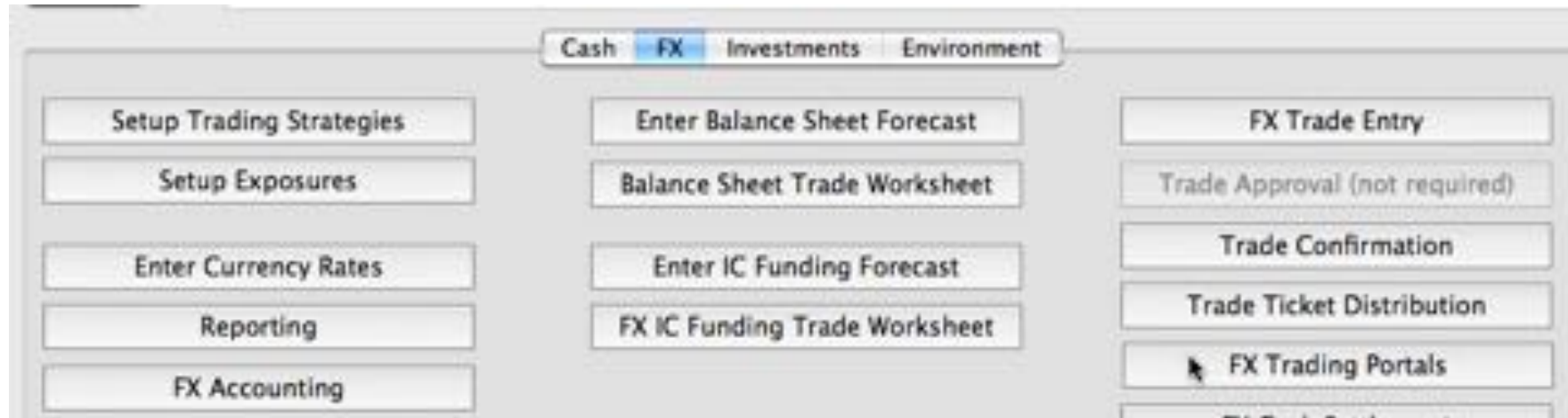
- The user who will be trading through the portal, must belong to a group which has the following permissions
 - Access FX Portal Trades window
 - Send Trades to FX Trading Portal
 - Get Trades From FX Trading Portal
- To be able to update portal settings as user must belong to a group that has “Configure Access to FX Trading Portal” permissions

FX Trading Portals



- We want Sandy to be able to trade
- We make sure she is a member of the “FX Traders” group

FX Trading Portals



- On the “Main Menu Window”, go to the “FX” tab
- Click the “FX Trading Portals” button

FX Trading Portals



- Click on the “Edit Portal Settings” button
- The “Edit Portal Settings” button will only be enabled if you (the user doing the update) belongs to a security group that has “Configure Access to FX Trading Portal” permissions

FX Trading Portals

The screenshot shows a 'Portal Setup' window with the following fields and controls:

- Portal Settings For: Portal (FXALL), UserID (sandy)
- Trading Portal Upload Server UserID: xxx@mycompany
- Active?: Active, 10/15/2010
- Send:
 - URL: https://qc.fxall.com/stpserver/OMSUpload
 - Password: (send and get passwords must be the same)
 - Delay: 30 (delay in seconds between retrys)
 - Retrys: 5 (number of retrys before giving up)
 - Applet URL: (empty)
 - Applet UserID: xxx@mycompany
- Get:
 - URL: https://qc.fxall.com/stpserver/download
 - Password: (send and get passwords must be the same)
 - No Destroy: 0 (0 = Delete trades from Portal, 1 = Save trades at Portal)
- Buttons: Delete, Save, Exit

- Select the userid from the “UserID” drop-down menu
- Fill in the required settings
- Note that the “Password” required is the password to the upload/download servers, not the password the trader uses to access the portal trading application/website
- The “Applet UserID” should hold the Trading Portal userID under which the user trades. This lets Orbit link the portal userID back to the Orbit userID since it is the portal userID that is stamped on trade records returned to Orbit by the portal