

Evolve UX Wireframes

Admin Gui

Version 0.07

Version History

| Document Name | Author | Date Modified | Notes |
|--|--------------|---------------|---|
| Evolve UX Wireframes - Admin GUI_v0.01 | Ben Campbell | 21 Aug 2013 | Document created |
| Evolve UX Wireframes - Admin GUI_v0.02 | Yooch Wan | 17 Sep 2013 | Added Limit Management, initial ideas for Session Management, Panic & Kick modes. |
| Evolve UX Wireframes - Admin GUI_v0.03 | Yooch Wan | 19 Sep 2013 | Added Filtering, Table Column Configuration, Pop-out panel for Region disable (Panic Mode), Drag 'n' drop column re-ordering, |
| Evolve UX Wireframes - Admin GUI_v0.04 | Yooch Wan | 20 Sep 2013 | Updated Configuration functionality, removing need for pop-out panel by moving auto-refresh to the toolbar. Cog icon now opens Edit Column Display Preferences. Added filtering using query builder within filter panel. |
| Evolve UX Wireframes - Admin GUI_v0.05 | Yooch Wan | 26 Sep 2013 | Added JIRA references to wireframes, Kick functionality features, grid column control functionality |
| Evolve UX Wireframes - Admin GUI_v0.06 | Ben Campbell | 27 Sep 2013 | Addition of Information Architecture page. Addition of right click. Addition of Notifications. Re-design of Kick controls. Addition of questions, suggestions. Re-formatting of document |
| Evolve UX Wireframes - Admin GUI_v0.07 | Ben Campbell | 28 Oct 2013 | Addition of: Suggested Information Architecture page, Future Implementation page, Admin GUI page including Glossary, Session Details action, suggested multi-function action button, Panic Region pages, Panic Selected pages, Disable Panic Selected page, User views of Kick notification and Login notification pages, Reset and Save as new buttons for user filters, Share link for user filters, UX library and Core Grid pages |

Information Architecture - Current Implementation

| Section | Entities | Available Actions | Notes |
|------------------------------------|----------------------------|--|--|
| Session Management | User(s) Region(s) | Panic (Disable all actions) Kick (Disconnect) View relevant data Filter relevant data Customise grid Export grid to Excel | |
| Limit Management | Global Counterparty(s) | Define and amend limits | Limits Parameters: Region, CCY, Type (Retail, Non-retail), Start and end tenor, Limit, Product |
| Notification and Action Management | TBC | Define Notification messages Send Notification messages | Limits Parameters: Severity, Locale, Title, Text |
| Counterparty Management | Counterparty(s) User(s) | Remove Client Add/Remove Relationship Manager PNL attribute | Bookable flag, Prime brokerage flag |
| User Management | User(s) | Edit user details Edit user permissions Counterparty Entitlements | Names, Systems, Groups, Activation and Authentication Roles, Permissions Mapping |
| Enterprise Integration Management | TBC | TBC | |

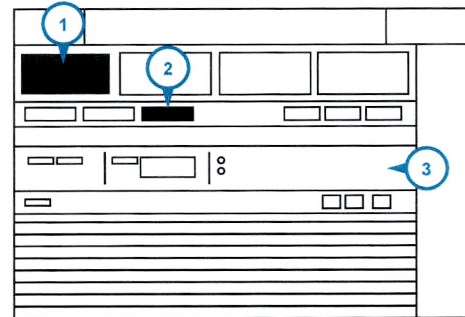
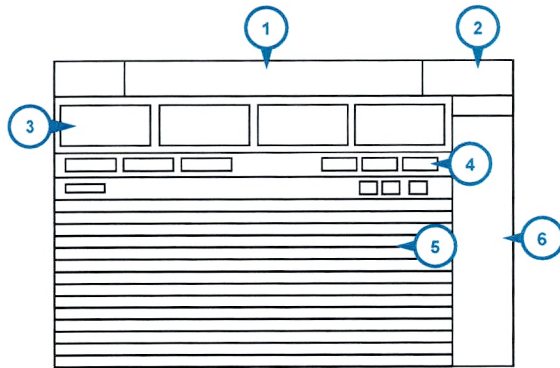
Suggested next steps: Organise functionality by Entity for example all User functionality should be grouped within the same section to improve useability

Information Architecture - Suggested Implementation

| Section | Entities | Available Actions | Entity | Notes |
|-----------------------------------|--|--|---|--|
| Admin Dashboard | Global Regions Counterparties Users | Panic (Disable all actions) Kick (Disconnect) View relevant data Filter relevant data Customise grid Export grid to Excel | Global/Regions/Users Global/Regions/Users Global/Regions/Counterparties/Users | |
| | | Edit user details Edit user permissions Counterparty Entitlements | Users | Names, Systems, Groups, Activation and Authentication Roles, Permissions Mapping |
| | | Define and amend limits | Global/Counterparties | Limits Parameters: Region, CCY, Type (Retail, Non-retail), Start and end tenor, Limit, Product |
| | | Define Notification messages Send Notification messages | Global/Regions/Users/Counterparties | Limits Parameters: Severity, Locale, Title, Text |
| | | Remove Client Add/Remove Relationship Manager PNL attribute | Users/Counterparties/Users | Bookable flag, Prime brokerage flag |
| Enterprise Integration Management | TBC | TBC | | |

Admin GUI - Future Implementation

Conceptual View - **Work In Progress**



Key Functional Areas:

- 1. Top Bar including logo - Menu
- 2. User Prefs etc
- 3. Entity selection and dashboard Summary
i.e Total number of user online, total users disabled, Counterparty status, Global status.
- 4. Action bar relevant for selected entity type
- 5. Data grid for selected entities
- 6. Action Centre - Requirements TBC

- 1. Selected entity type
- 2. Selected Action
- 3. Action options e.g.

Admin GUI

Session Management

Session Management Grid Fields

Full name / Username / Email Address / User Type / User Sub Type / Sales Group / Trading Centre / PO Unit Session ID / Node/Server / Initial Login / Session Duration / Windows Version

Grid Features

Core Grid Features

Panic all Regions / Panic / EMEA / Panic Americas / Panic APAC

Select All

Select None

Export to Excel

Panic

Kick

Session Details

Kick Controls

Immediately

After Countdown

Timer (Hours, Mins, Secs) / Broadcast message / Preview message field / Display message radio (notification/popup) / Confirm and Cancel

At Specified Time

Time input / Broadcast message selection / Preview message field / Display message radio (notification/popup) / Confirm and Cancel

Notification Types

Notification Bar

Pop-Up

Notifications

Your Session will be terminated in: XX:XX

Your Session will be terminated at: XX:XX GMT

Your Session has been terminate. Please try to login again (Kick)

Your Session has been terminated. Please contact eClient Services (Panic)

You cannot login... Please try again later (Kick)

You cannot login...Please contact eClient Services (Panic)

Right Click

Select All

Deselect All

Panic Selected

Kick Selected

Session Details

Export Selected to Excel

Export All to Excel

Glossary

Panic

All selected entities are immediately logged out and accounts disabled

Kick

All selected entities are logged out either immediately, after a timer, or at a specified time. Users are able to login after a certain time period.

Entities

Global/Region/Counterparties/Users

Disabled Account

Users with disabled accounts are unable to login until their account has been re-enabled

Notification Bar

Bar that appears in evolve interface above the trading canvas and content area

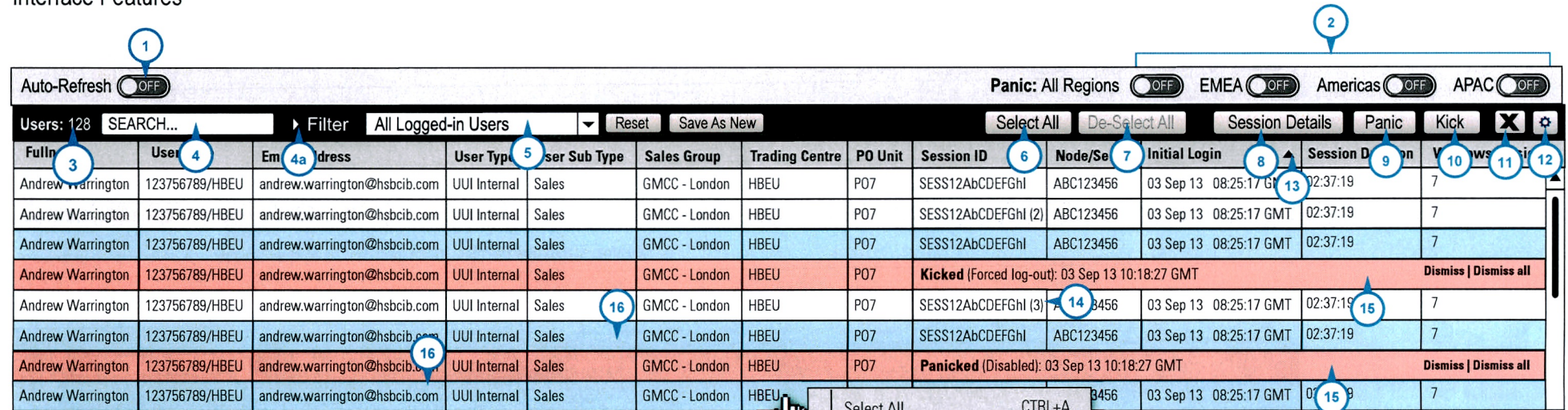
Session Management - User Stories

| JIRA | User Story | Notes |
|----------|--|--|
| UUI-1005 | As an administrator, I can view logged user's attributes | |
| UUI-1037 | As an administrator, I can disable (panic) individual user | Panic (Disable) = No actions available. Cannot re-login |
| UUI-1036 | As an administrator, I can disconnect (kick) individual user | Kick (Disconnect) = Forced to log-out. Can re-login. AKA 'Kick' |
| UUI-606 | As an administrator, I can enable/disable panic mode per region | Regions = London, Hong Kong, New York |
| UUI-1015 | As an administrator, I can send messages to logged users. | |
| UUI-1014 | As an administrator, I can filter the logged users by attributes | |
| UUI-1013 | As an administrator, I can disconnect (kick) groups | Regions = London, Hong Kong, New York |
| UUI-1012 | As an administrator, I can disconnect (kick) logged users at module level | Modules = Trading, Post Trade, FX trading blotter etc |
| UUI-1011 | As an administrator, I can see the email address in logged in user list | |
| UUI-1010 | As an administrator, I can view user by connection platform, e.g Sales UI, Admin UI | |
| UUI-1009 | As an administrator, I can see most recent users appear at the top of the logged user list | |
| UUI-1008 | As an administrator, I can see how long a user has been logged in | |
| UUI-1007 | As an administrator, I can see the datetime of the connection or user log-in | |
| UUI-1006 | As an administrator, I can see the node, session and server the logged user is connecting to | |
| UUI-1005 | As an administrator, I can view logged user's attributes | |
| UUI-956 | As an administrator, I can view logged users by geographic regions (EMEA, APAC, Americas) | |
| UUI-756 | As a logged-in user, I will be informed when I am being logged out, with a countdown | |
| UUI-607 | As an administrator, I should be able to see OS and browser settings of logged in admin users | |
| UUI-605 | As an administrator, I should be able to see OS and browser settings of logged in admin users | |
| UUI-605 | As an administrator, I can kick users off the system and send a free text message as notification | |
| UUI-1065 | As an administrator, I can customize the columns in the session list and this preference can be saved in browser cache | |
| UUI-1066 | As an administrator, I can customize the columns in the session list and this preference can be saved in browser cache | |
| UUI-1117 | As an administrator, I can kick out Sales UI and Client UI users | Internal / External users |
| UUI-1035 | As an administrator, I can kick out and disable multiple users at once | |
| UUI-752 | Export logged in users to Excel | |
| UUI-1068 | In session management screen, the list can be auto refresh, and user can turn off the auto-refresh temporarily | |
| UUI-755 | As an administrator, I can kick out all users off in a region | |

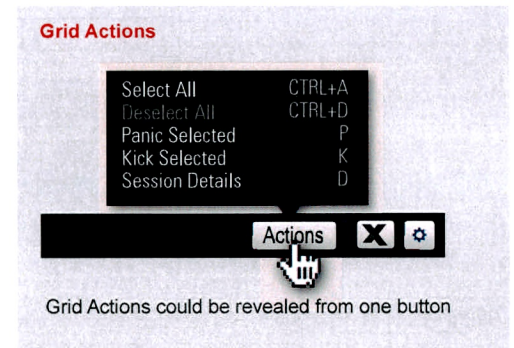
Confirmation: Definition / Name for 'Panic' and 'Kick'

Session Management - Interface Overview

Interface Features



1. Auto-Refresh toggle switch (UUI-1068)
2. Region Panic Controls (UUI-755, UUI-606)
3. Number of entries in grid
4. Search/Filter field - Grid wide, free-form (UUI-1014)
- 4a. Expand filter row
5. Pre-defined filter controls
6. Select all entries in the grid
7. De-select all entries in the grid - Active when entries in grid are selected
8. Session details - Active when user with multiple sessions is selected. [View multiple session details?](#)
9. Panic selected users button - Log out selected users and disable their account (UUI-1037)
10. Kick selected users button - Log out selected users and be able to choose warning notice (UUI-1036, UUI-1015, UUI-1013, UUI-1012, UUI-605, UUI-1117, UUI-1035)
11. Export contents of grid to Excel button (UUI-752)
12. Grid column controls button (UUI-1065)
13. Column sort control (UUI-1009)
14. User with multiple sessions
15. Users that have been forced to log-out and disabled within the admin user session (Not displayed if Auto-Refresh is on)
14. User details grid (UUI-1005, UUI-1011, UUI-1010, UUI-1008, UUI-1007, UUI-1006, UUI-956, UUI-607)
15. Multiple row selection (CTRL, SHIFT, click and drag)
17. Right click context menu with key commands



Grid Features - Panic Region

I can enable and disable panic mode per region

UUI-606

Enable Panic - Regions

Auto-Refresh Panic: All Regions EMEA Americas APAC

2 Users logged out and disabled: 03 Sep 13 10:25:56 GMT

Users: 128 SEARCH... Filter All Logged-in Users Reset Save As New Select All De-Select All Session Details Panic Kick X

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. Click All Regions Panic toggle to activate

Auto-Refresh Panic: All Regions EMEA Americas APAC

All Regions Panicked: 03 Sep 13 10:25:56 GMT

Users: 0 SEARCH... Filter All Logged-in Users Reset Save As New Select All De-Select All Session Details Panic Kick X

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-----------|----------|---------------|-----------|---------------|-------------|----------------|---------|------------|-------------|---------------|------------------|-----------------|
| | | | | | | | | | | | | |

2. Confirmation displayed (Could be user preference?). All users disabled and grid is cleared

Enable Panic - Regions

Auto-Refresh Panic: All Regions EMEA Americas APAC

1. When panic has been enabled for a region, clicking the relevant panic toggle will enable all users for that region

Auto-Refresh Panic: All Regions EMEA Americas APAC

All Regions Enabled: 03 Sep 13 10:25:56 GMT

Users: 128 SEARCH... Filter All Logged-in Users Reset Save As New Select All De-Select All Session Details Panic Kick X

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

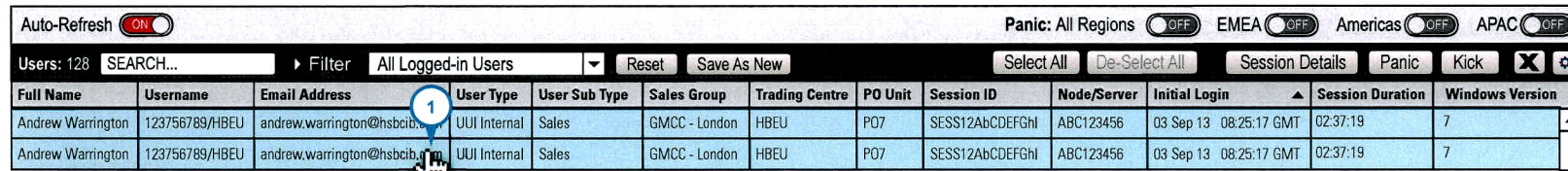
1. Click All Regions Panic toggle to activate

Grid Features - Panic Selected

I can enable and disable panic for individual user / I can enable and disable panic for selected users

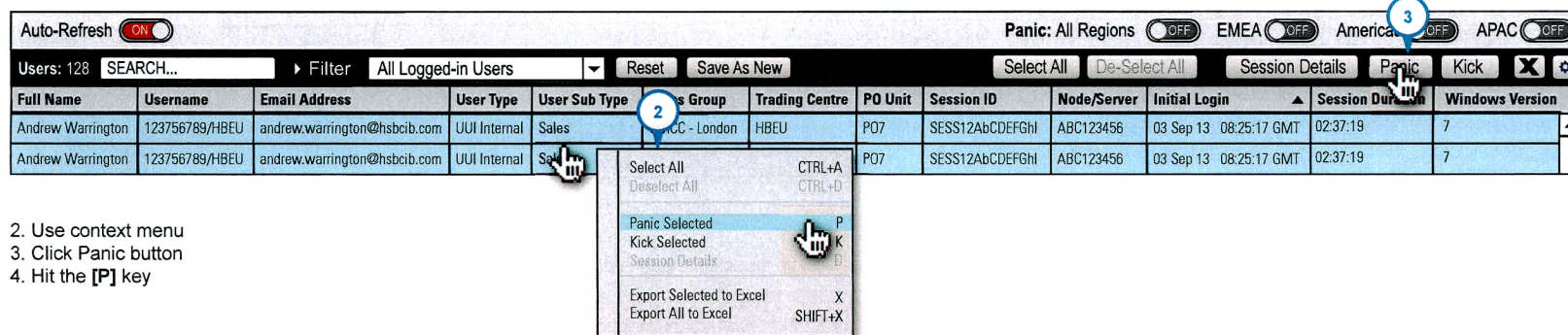
UUI-755, UUI-606, UUI-1037, UUI-1063

Enable Panic - Selected Users



| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. Make selection



| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Select All CTRL+A

Deselect All CTRL+D

Panic Selected P

Kick Selected K

Session Details D

Export Selected to Excel X

Export All to Excel SHIFT+X

- 2. Use context menu
- 3. Click Panic button
- 4. Hit the [P] key

Panic Selected Confirmation - Auto Refresh On



| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGH | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Auto-refresh is on so users that have been logged out and disabled (Panicked) are not displayed in grid



Grid Features - Panic Selected Continued

I can enable and disable panic for individual user / I can enable and disable panic for selected users

UUI-755, UUI-606, UUI-1037, UUI-1063

Panic SelectedConfirmation - Auto Refresh Off

Auto-Refresh OFF Panic: All Regions OFF EMEA OFF Americas OFF APAC OFF

 2 Users logged out and disabled: 03 Sep 13 10:25:56 GMT 

Users: 128 Filter

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|---|-------------|---------------|------------------|-----------------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | Panicked (Disabled): 03 Sep 13 10:18:27 GMT | | | | Dismiss Dismiss all |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | Panicked (Disabled): 03 Sep 13 10:18:27 GMT | | | | Dismiss Dismiss all |

When auto-refresh is off users that have been logged out are displayed in grid and can be dismissed manually

Panic Selected Confirmation - Panic Failed

Auto-Refresh ON Panic: All Regions OFF EMEA OFF Americas OFF APAC OFF

 Panic for 2 users failed: 03 Sep 13 10:25:56 GMT 

Users: 128 Filter

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Q. Is this required?

Grid Features - Disable Panic Selected

I can enable and disable panic for individual user / I can enable and disable panic for selected users

UUI-755, UUI-606, UUI-1037, UUI-1063

Disable Panic - Selected Users

Auto-Refresh Panic: All Regions EMEA Americas APAC

Users: 128 SEARCH... Filter All Disabled Users Reset Save As New Select All De-Select All Enable X

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. Make selection

Auto-Refresh Panic: All Regions EMEA Americas APAC

Users: 128 SEARCH... Filter All Disabled Users Reset Save As New Select All De-Select All Enable X

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Select All CTRL+A

Deselect All CTRL+D

Enable Selected SHIFT+P

Export Selected to Excel X



Export All to Excel SHIFT+X

2. Use context menu

3. Click Enable button

4. Use [SHIFT+P] key combination

Auto-Refresh Panic: All Regions EMEA Americas APAC

 2 Users enabled: 03 Sep 13 10:25:56 GMT 

Users: 128 SEARCH... Filter All Disabled-in Users Reset Save As New Select All De-Select All Enable X

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Auto-refresh is on so users that have been enabled are not displayed in the grid when filtered to show all disabled users

If Auto-refresh is turned off, enabled users will be displayed in grid and can be manually dismissed:

| | | | | | | | | | |
|-------------------|----------------|------------------------------|--------------|-------|---------------|------|-----|---------------------------------|-----------------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | Enabled: 03 Sep 13 10:18:27 GMT | Dismiss Dismiss all |
|-------------------|----------------|------------------------------|--------------|-------|---------------|------|-----|---------------------------------|-----------------------|

Grid Features - Kick

I can kick an individual user / I can kick multiple users

UUI-1036, UUI-1015, UUI-1013, UUI-1012, UUI-605, UUI-1117, UUI-1035, UUI-755

Kick Selected

Users: 128 Filter All EMEA Users (180)

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading P | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|-----------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. Use filter controls and make selection

Users: 500 Filter All EMEA Users (180)

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|-------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sa | | | PO7 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sa | | | PO7 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Select All CTRL+A
 Deselect All CTRL+D
 Panic Selected P
Kick Selected K
 Session Details D
 Export Selected to Excel X
 Export All to Excel SHIFT+X

- 2. Use context menu
- 3. Click Kick button
- 4. Hit the [K] key

Kick

Users: 500 Filter All EMEA Users (180)

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

- 1. Kick controls are revealed
- 2. Click the **Immediately** button to Kick selected immediately

Grid Features - Kick Continued

I can kick an individual user / I can kick multiple users

UUI-1036, UUI-1015, UUI-1013, UUI-1012, UUI-605, UUI-1117, UUI-1035, UUI-755

Kick - After Countdown

Kick
Cancel
Immediately
After Countdown
At Specified Time

Countdown Timer: Minutes Seconds

Broadcast Message:

Display Message as Notification Pop-up

Cancel Confirm

Users: 500
Filter
Reset
Save As New
Select All
De-Select All
Session Details
Panic
Kick

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Kick - At a Specified Time

Kick
Cancel
Immediately
After Countdown
At Specified Time

Time:

Broadcast Message:

Display Message as Notification Pop-up

Cancel Confirm

Users: 500
Filter
Reset
Save As New
Select All
De-Select All
Session Details
Panic
Kick

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | P07 | SESS12AbCDEFGHl | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Question: Restrict by module. Will this be filterable in the grid or controls within Kick?

Session Management - Session Details

I can easily identify users who have multiple sessions / I can reveal details of user's multiple sessions

TBC

Reveal details of user's multiple sessions

| Fullname | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|---------------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl (3) | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl (2) | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. Select user with multiple sessions

| Fullname | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|---------------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl (3) | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO7 | SESS12AbCDEFGHl (2) | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Select All CTRL+A
 Deselect All CTRL+D
 Panic Selected P
 Kick Selected K
 Session Details D
 Export Selected to Excel X
 Export All to Excel SHIFT+X

- 2. Use context menu
- 3. Click Session Details button
- 4. Hit the [D] key

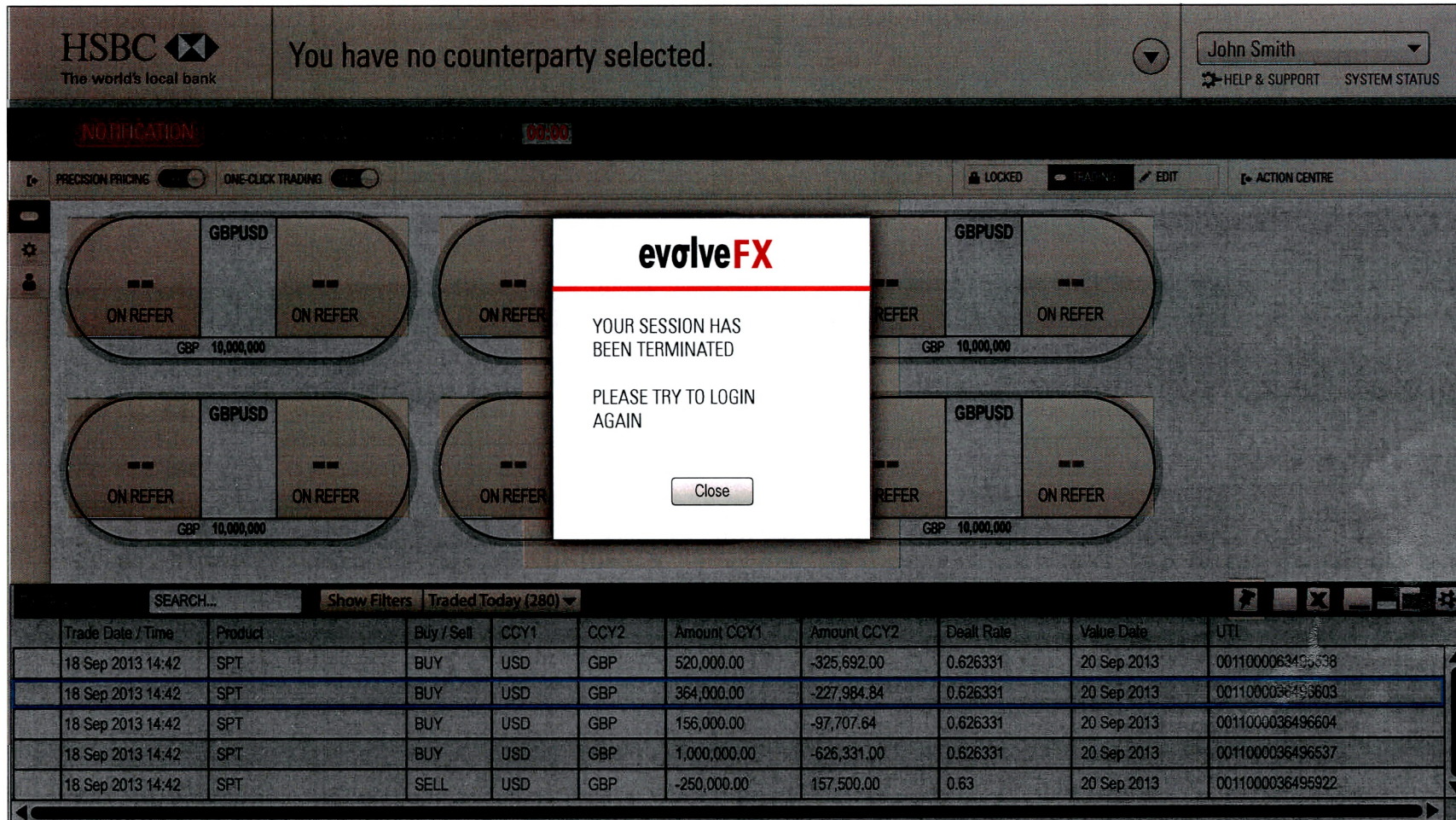
| Fullname | Username | Email Address | Session ID | User Identifier | Server Instance | Server Location | Transport Server Instance | Transport Server Location | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|-----------------|-----------------|-----------------|-----------------|---------------------------|---------------------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGHl | 1029 | gbs00702 | ldn | gbs00680 | ldn | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGHl | 1029 | gbs00702 | ldn | gbs00680 | ldn | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

Session details overlay is displayed

Kick Notifications - User Views of evolveFX Trading Canvas

UUI-756

Notification - Session Terminated Message after Countdown Expired



evolveFX

YOUR SESSION HAS BEEN TERMINATED

PLEASE TRY TO LOGIN AGAIN


Close

| Trade Date / Time | Product | Buy / Sell | CCY1 | CCY2 | Amount CCY1 | Amount CCY2 | Deal Rate | Value Date | UTI |
|-------------------|---------|------------|------|------|--------------|-------------|-----------|-------------|------------------|
| 18 Sep 2013 14:42 | SPT | BUY | USD | GBP | 520,000.00 | -325,692.00 | 0.626331 | 20 Sep 2013 | 0011000063495338 |
| 18 Sep 2013 14:42 | SPT | BUY | USD | GBP | 364,000.00 | -227,984.84 | 0.626331 | 20 Sep 2013 | 0011000063495603 |
| 18 Sep 2013 14:42 | SPT | BUY | USD | GBP | 156,000.00 | -97,707.64 | 0.626331 | 20 Sep 2013 | 0011000036496604 |
| 18 Sep 2013 14:42 | SPT | BUY | USD | GBP | 1,000,000.00 | -626,331.00 | 0.626331 | 20 Sep 2013 | 0011000036496537 |
| 18 Sep 2013 14:42 | SPT | SELL | USD | GBP | -250,000.00 | 157,500.00 | 0.63 | 20 Sep 2013 | 0011000036495922 |


Kick Notifications

UUI-756

Notification - Countdown

| | | |
|---|------------------------------------|--|
|  The world's local bank | You have no counterparty selected. | John Smith HELP & SUPPORT SYSTEM STATUS |
| NOTIFICATION YOUR SESSION WILL BE TERMINATED IN 05:30 | | |

Notification - At a specified time

| | | |
|---|------------------------------------|--|
|  The world's local bank | You have no counterparty selected. | John Smith HELP & SUPPORT SYSTEM STATUS |
| NOTIFICATION YOUR SESSION WILL BE TERMINATED AT 12:55 GMT | | |

Pop-Up - Countdown

evolveFX

YOUR SESSION WILL BE TERMINATED IN

05:30

Close

Pop-Up - At a specified time

evolveFX

YOUR SESSION WILL BE TERMINATED AT

12:55 GMT

Close

Pop-Up - Kick session termination

evolveFX

YOUR SESSION HAS BEEN TERMINATED

PLEASE TRY TO LOGIN AGAIN

Close

Pop-Up - Panic session termination

evolveFX

YOUR SESSION HAS BEEN TERMINATED

PLEASE CONTACT eCLIENT SERVICES

Close

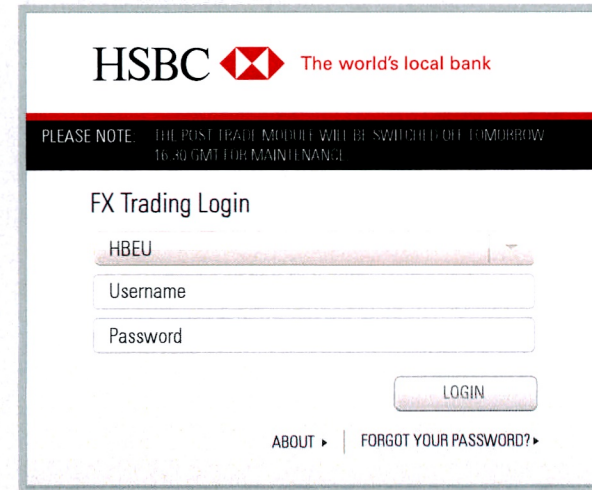
Please note: Pop-ups are modal

Login Notification Examples

Offline user - Account has been disabled



Example of module specific notification at login



UX Library - Grids

Core Grid Features

Filters

Free-Form Single Value Filter
 Manual Filter Controls (Query Builder: Single /Multiple Filters, Pre-Defined, User-Defined)

Columns

Column Re-Ordering
 Column Sorting
 Column Filtering (Quick Column Filter, Multiple Filters)
 Column Configuration Controls (Display, Order)
 Scrolling (Including Infinite Scrolling)

Rows

Row Rollover
 Row Selection Single
 Row Selection Multiple (CTRL and SHIFT click, Click and Drag)
 Row State Indication (Admin GUI: Online, Offline, Disabled, **tbc**)
 Row Type Indication (Admin GUI: **tbc**)
 Right-Click Actions

Cells

Cell Formatting (**tbc**)
 Cell Rollover
 Cell Selection (Single)
 Cell State Indication (Inherited from Row State, **tbc**)
 Cell Type Indication (Inherited from Row State, **tbc**)
 Right-Click Actions

Actions

Copy Value(s)
 Export Value(s) (To Excel)
 Import Values(s) (**tbc**)
 Show Details
 Project Specific Requirements (**tbc**)

Views

Zoom

Grid Projects

Execution

evolveFX Trade Blotter - External
 evolveFX Trade Blotter - Internal
 evolveFX - Institutional Allocations

Post Trade

evolve Post Trade Blotter - Internal
 evolve Post Trade Blotter - External
 evolve Post Trade - Delegated Reporting

Admin

Admin GUI
 Universal Trade Enquiry (UTE) Blotter

Grid Core Features - Filters

Free-Form Single Value Filter
 Advanced Filter Controls: Pre-Defined Filters (System Defined Filters/User-Defined Filters) Query Builder: Single Filter / Multiple Filters, Save Filters

UUI-1014, UUI-1010, UUI-956

Free-Form Single Value Filter

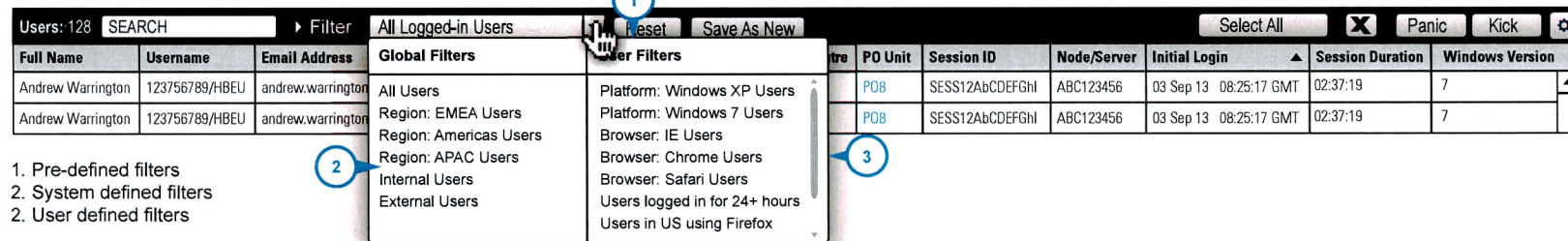


| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO8 | SESS12AbCDEFGHI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | Sales | GMCC - London | HBEU | PO8 | SESS12AbCDEFGHI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. As user types in Search field, grid is automatically filtered to show matching entry
2. Number of entries displayed in grid
3. Matches

To be added:
 - Save Filters
 - Share User Filters

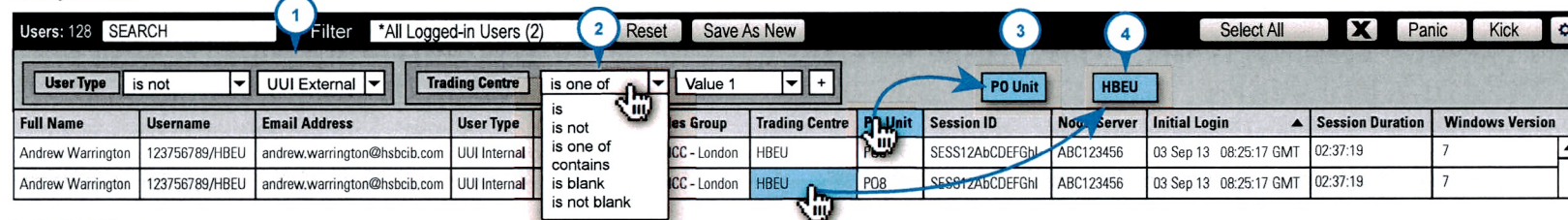
Advanced Filter Controls



| Full Name | Username | Email Address | Global Filters | User Filters | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|------------------------|-------------------------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | All Users | Platform: Windows XP Users | PO8 | SESS12AbCDEFGHI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | Region: EMEA Users | Platform: Windows 7 Users | PO8 | SESS12AbCDEFGHI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | Region: Americas Users | Browser: IE Users | | | | | | |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | Region: APAC Users | Browser: Chrome Users | | | | | | |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | Internal Users | Browser: Safari Users | | | | | | |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | External Users | Users logged in for 24+ hours | | | | | | |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | | Users in US using Firefox | | | | | | |

1. Pre-defined filters
2. System defined filters
2. User defined filters

Query Builder



| Full Name | Username | Email Address | User Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | GMCC - London | HBEU | PO8 | SESS12AbCDEFGHI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UUI Internal | GMCC - London | HBEU | PO8 | SESS12AbCDEFGHI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. Applied filters
2. Filter parameters
3. Filter by column
4. Filter by cell

Grid Core Features - Filters Continued

Free-Form Single Value Filter
 Advanced Filter Controls: Pre-Defined Filters (System Defined Filters/User-Defined Filters) Query Builder: Single Filter / Multiple Filters, Save Filters

UII-1014, UII-1010, UII-956

Free-Form Single Value Filter

| Full Name | Username | Email Address | User Type | User Sub Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UII Internal | Sales | GMCC - London | HBEU | PO8 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UII Internal | Sales | GMCC - London | HBEU | PO8 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

To be added:
 - Save Filters
 - Share User Filters

1. As user types in Search field, grid is automatically filtered to show matching entry
2. Number of entries displayed in grid
3. Matches

Advanced Filter Controls

1. Pre-defined filters
2. System defined filters
2. User defined filters

Query Builder

| Full Name | Username | Email Address | User Type | Sales Group | Trading Centre | PO Unit | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|--------------|---------------|----------------|---------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UII Internal | GMCC - London | HBEU | PO8 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | UII Internal | GMCC - London | HBEU | PO8 | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

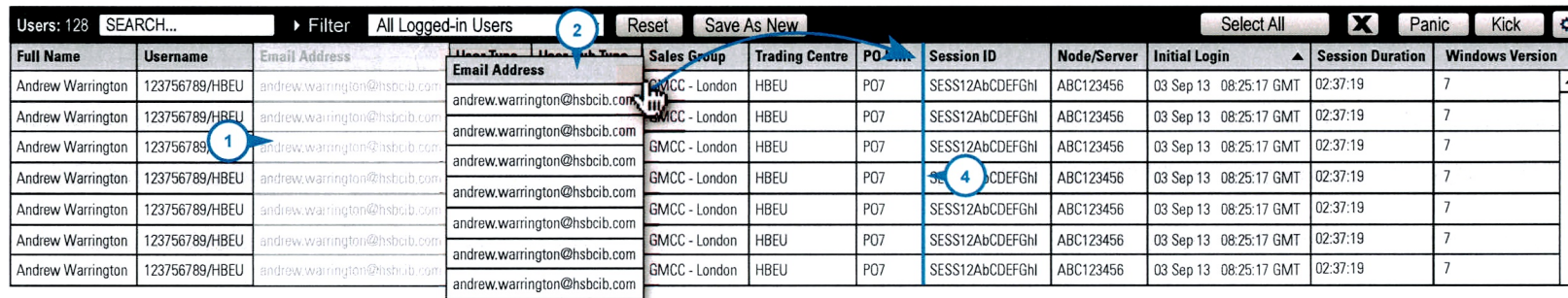
1. Applied filters
2. Filter parameters
3. Filter by column
4. Filter by cell

Grid Core Features - Columns

Column Re-Ordering / Column Sorting / Column Filtering (Quick Column Filter, Multiple Filters) / Column Configuration Controls (Display, Order) / Scrolling (Including Infinite Scrolling)

UUI-1065

Column Re-Ordering



| Full Name | Username | Email Address | Session ID | Node/Server | Initial Login | Session Duration | Windows Version |
|-------------------|----------------|------------------------------|-----------------|-------------|------------------------|------------------|-----------------|
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |
| Andrew Warrington | 123756789/HBEU | andrew.warrington@hsbcib.com | SESS12AbCDEFGhI | ABC123456 | 03 Sep 13 08:25:17 GMT | 02:37:19 | 7 |

1. User moves cursor over the header of the column to be moved and keeps the mouse button pressed down whilst dragging the header towards new position within the data grid
2. As the user moves the cursor a 'ghost' image of the column header moves with it
3. A vertical marker appears indicating potential insertion point for the column as the cursor moves across the grid.

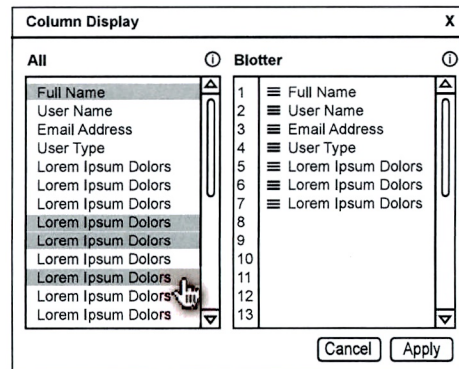
User releases mouse button at desired insertion point to position column at that new location within the data grid

Grid Core Features - Columns Continued

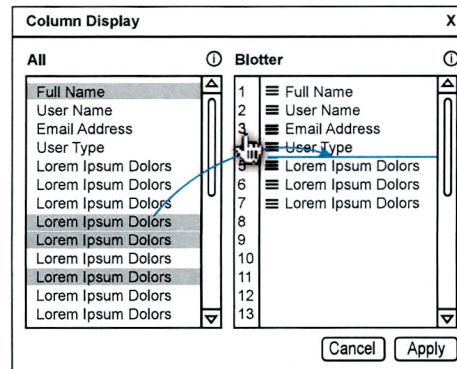
Column Re-Ordering / Column Sorting / Column Filtering (Quick Column Filter, Multiple Filters) / Column Configuration Controls (Display, Order) / Scrolling (Including Infinite Scrolling)

UUI-1065

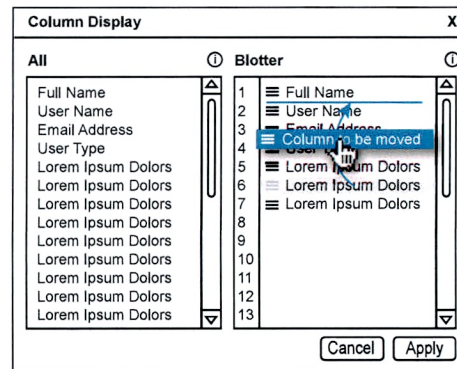
Column Configuration Controls



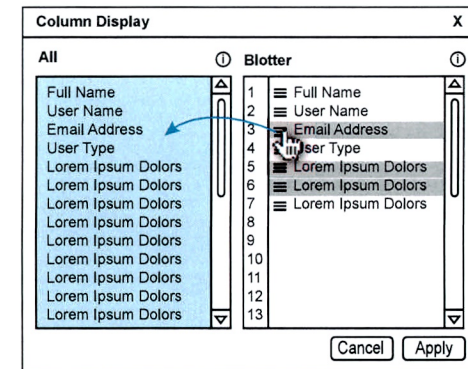
1. Selection of required columns from full list including click and drag, CTRL and SHIFT click selection techniques



2. Selected columns can be dragged into the Blotter Columns table



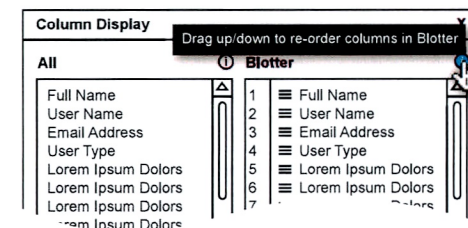
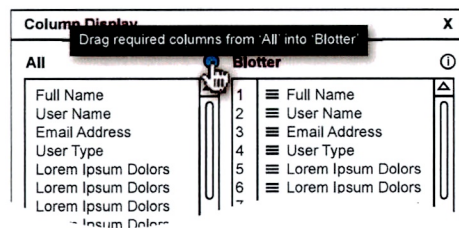
3. Columns can be dragged and dropped into the required position



4. Columns can be removed from blotter view by dragging and dropping into All Columns table or hitting the [DELETE] key.

Changes are committed after the **Ok** button is clicked and the pop-up is closed

Instructional Tooltips



Instructional tooltips displayed on rollover of icon

Grid Core Features - Rows

Row Rollover / Row Selection Single / Row Selection Multiple (CTRL and SHIFT click, Click and Drag) / Row State Indication (Online, Offline,) / Row Type Indication (Multiple Leg Trades, Allocations, tbc) / Right-Click Actions

To Be Confirmed: Admin GUI Row States

Rows

Online, Offline, Disabled, Multi-Session