

Stock Quotes Web Part

User Guide

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1 INTRODUCTION

Stock Quotes Web Part provides you with an easy method of displaying up to date financial and stock information on your SharePoint 2007 (MOSS 2007) portal.

You can utilize the Web Part in multiple ways, displaying stock information for just one particular stock, or adding multiple stocks to the Web Part.

You can configure the layout of the Web Part, including the header, item, and footer templates, while also providing optional features such as the ability for users to add their own stocks to the Web Part if they wish.

Features:

Up to date information!

Stock Quotes for MOSS 2007 provides you with up to date stock quotes (only 20 minute delays!). For each stock symbol you can retrieve the following:

- Stock Symbol
- Last Trade Price
- Last Trade Date
- Last Trade Time
- Price Change
- Day Open Price
- Day High Price
- Day Low Price
- Volume
- Market Cap
- Prev Close Price
- Percentage Change
- 52 Week Range (low to high)
- EPS
- PE
- Company Name
- Setup as few or as many stock symbols to be displayed
- Set the sort order of each ticker symbol

Additional Features:

- Optionally set a header or footer to the stock Web Part
- Get creative! Add links back to financial institutions for particular stocks and add images, graphics, detailed stock information with each stock symbol

Note: this manual assumes prior experience with SharePoint Portal 2007.

2 INSTALLATION PROCEDURE

Note: this section of the document will outline simple steps for installing the “Stock Quotes” web part. You can find full instructions for installing a SharePoint 2007 Web Part at the following address:

<http://www.datasprings.com/Resources/ArticlesInformation/SharePoint2007CustomWebParts/tabid/775/Default.aspx>

You should follow these steps in order to successfully install the Stock Quotes Web Part:

1. After your purchase, download and unzip the installation file to a directory (in our example c:\mossdeploy). One of the files that will be extracted is **DataSprings_StockQuote.wsp**
2. Execute the following cmd using STSADM.EXE (typically under c:\program files\common files\Microsoft Shared\web server extensions\12\bin\ or, use the shortcut that is provided and also extracted called quickdir.bat

```
STSADM -o addsolution -filename "c:\mossdeploy\DataSprings_StockQuote.wsp"
```

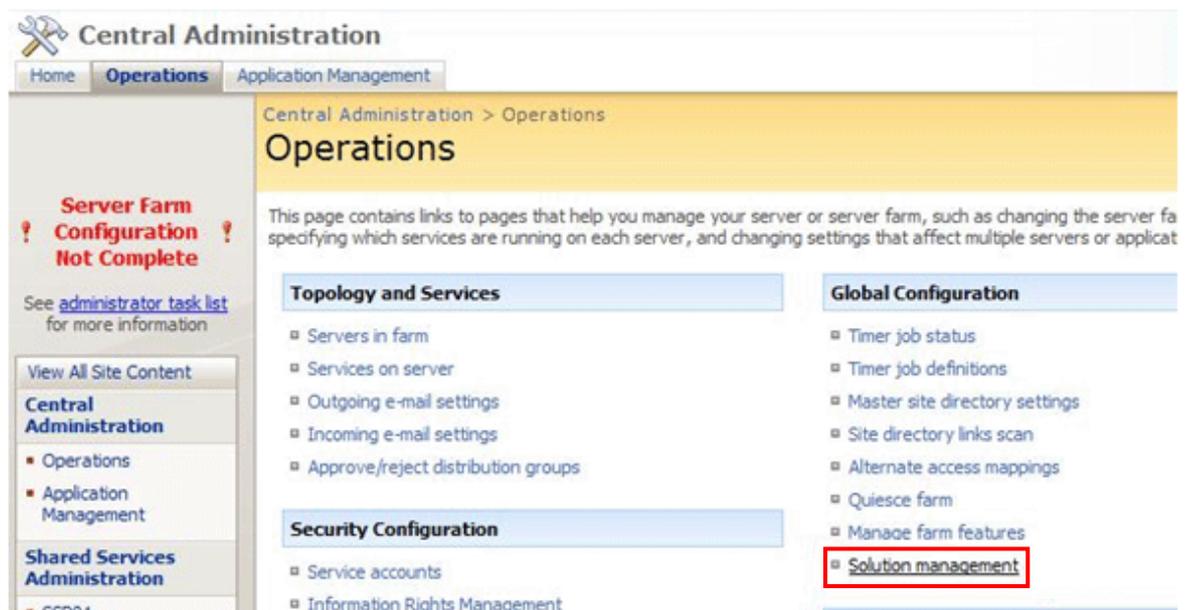


```

WSSv3Cmd
C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN>
stsadm -o addsolution -filename "c:\wsp\datasprings_stockquote.wsp"

Operation completed successfully.
  
```

3. Navigate to your **Central Administration** page
 - a. Click on **Operations**
 - b. Click on **Solution Management** (last link under the section **Global Configuration**)



- c. Click on **DataSprings_StockQuote.wsp**
 - d. Click on **deploy** (select now or a date and time along with what site(s) you would like to deploy the web part to)

Central Administration

Home Operations Application Management

Central Administration > Operations > Solution Management > Solution Properties > Deploy Solution

Deploy Solution

Use this page to deploy the solution.

Server Farm Configuration Not Complete
See [administrator task list](#) for more information.

View All Site Content

Central Administration

- Operations
- Application Management

Shared Services Administration

- SSP1

Recycle Bin

Solution Information
Information on the solution you have chosen to deploy.

Name: datasprings_stockquote.wsp
Locale: 0
Deployed To: http://intranet/
Deployment Status:

Deploy When?
A timer job is created to deploy this solution. Please specify the time at which you want this solution to be deployed.

Choose when to deploy the solution:
 Now
 At a specified time:
 7/15/2007 1 PM 00

Deploy To?
The solution contains Web application scoped resources and should be deployed to specific Web applications. Please choose the Web application where you want the solution to be deployed.

Choose a Web application to deploy this solution:
 http://ssp01/

Your web part should now be available to be added to your SharePoint portal.

2.1 After installation notes:

Important: Do not add the StockQuote.dll to the GAC. The web part renders files located in the wpresources directory and this directory is different if the DLL is added to the GAC.

2.2 Troubleshooting

In case the Web part is not displaying, you might need to modify the **web.config** file.

- **Replace the line:**

Trust = "WSS_Minimal"

With

Trust = "WSS_Medium"

3 STOCK QUOTES MAIN MENU

In order to access the “Stock Quotes” web part main menu, click on the arrow symbol next to the “Stock Quotes” label.



You don't have to display stock information for multiple stocks if you don't want to - you can use the module to just display stock information for just one particular stock:

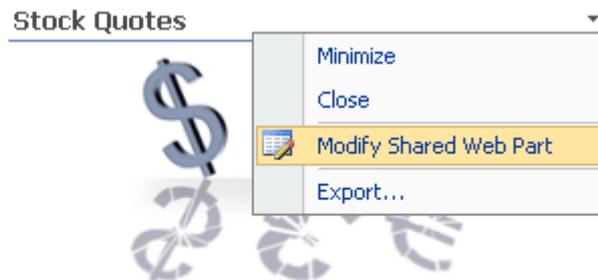
Figure 1: Stock Quotes Main Menu

The following options are available inside the main menu:

- **Minimize** – click on this option if you want to minimize the web part
- **Close** – option for removing the Web Part from the page (**note:** this will also reset all changes made to the Web Part)
- **Modify Shared Web Part** – option for modifying the Stock Quotes settings (see section 4.1)
- **Export** – option for exporting web part configuration and settings (see section 5)

4 MODIFYING STOCK QUOTES SETTINGS

In order to start modifying the stock quotes settings, choose “Modify Shared Web Part” option from the main menu.



You don't have to display stock information for multiple stocks if you don't want to - you can use the module to just display stock information for just one particular stock:

Figure 2: Modifying Shared Web Part

The following screen will be displayed.

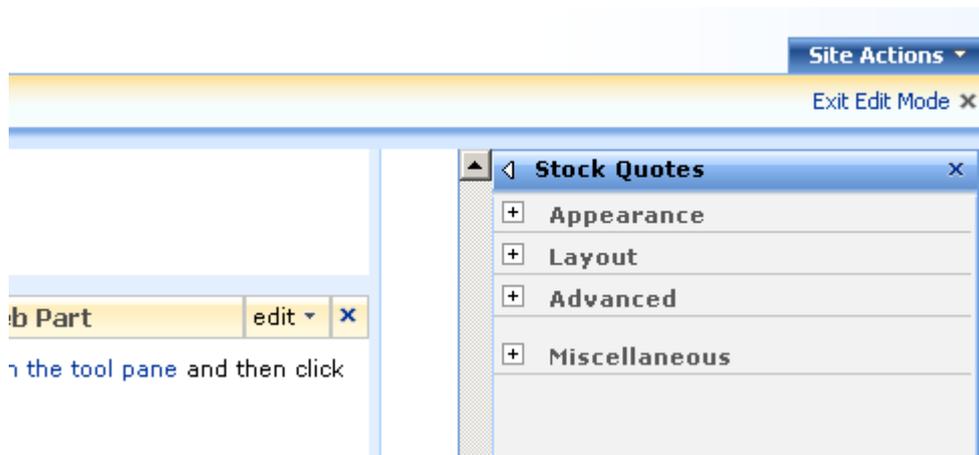


Figure 3: Available options for modifying Stock Quotes

The following options are available inside this screen:

- **Appearance** – see section 4.1
- **Layout** – see section 4.2
- **Advanced** – see section 4.3
- **Miscellaneous** – see section 4.4

4.1 Modifying “Stock Quotes” Web Part Appearance

In order to start modifying the “Stock Quotes” web part appearance, choose option “Modify Shared Web Part” from the main menu and click on the “+” symbol next to the “Appearance” label.

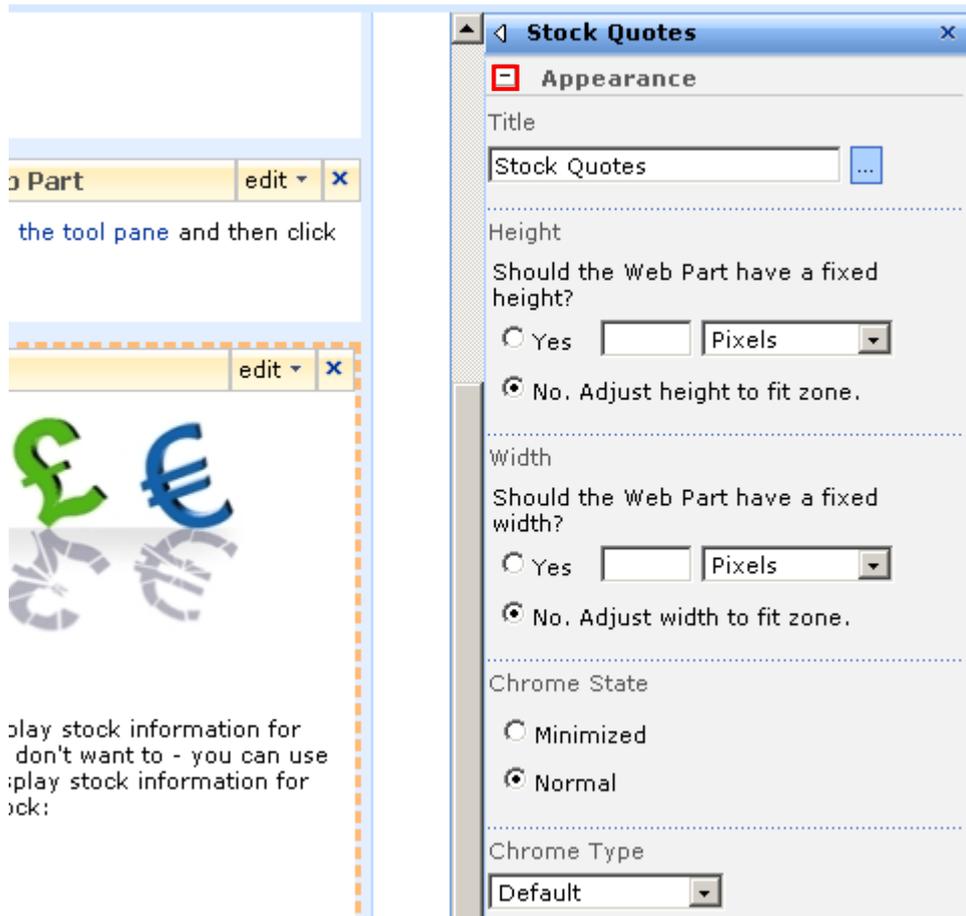


Figure 4: Modifying Web Part Appearance

The following parameters are available inside this screen:

- **Title** – input field for setting the web part title
- **Height** – option for setting the web part height; choose one of the following:
 - **Yes** – select this radio button if you want to set a fixed height for the web part and then enter the desired value and choose the desired category (e.g. Pixels or Centimeters)
 - **No. Adjust width to fit zone** – select this radio button if you do not wish to set the fixed height but adjust the height to fit the zone
- **Width** – option for setting the web part width; choose one of the following:
 - **Yes** – select this radio button if you want to set a fixed width for the web part and then enter the desired value and choose the desired category (e.g. Pixels or Centimeters)
 - **No. Adjust width to fit zone** – select this radio button if you do not wish to set the fixed width but adjust the height to fit the zone

After setting the desired parameters, click on the “OK” button in order to save the changes.

4.2 Modifying the Layout

In order to start modifying the “Stock Quotes” web part layout, choose option “Modify Shared Web Part” from the main menu and click on the “+” symbol next to the “Layout” label.

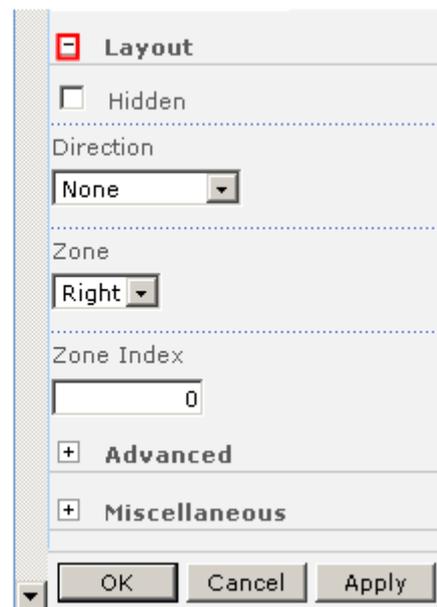


Figure 5: Using the layout parameters

The following parameters are available inside this screen:

- **Hidden** – select this checkbox if you wish to hide the Web Part
- **Direction** – select the desired direction from this pull down menu:
 - Left to Right
 - Right to Left
- **Zone** – select the desired zone orientation i.e. the location of the web part within the page
- **Zone Index** – enter the desired Zone Index value i.e. the value for setting the desired sort order for this web part (the smaller the value the closer to the top will the web part be placed)

4.3 Modifying Advanced Settings

In order to start modifying the “Stock Quotes” web part advanced settings choose option “Modify Shared Web Part” from the main menu and click on the “+” symbol next to the “Advanced” label.

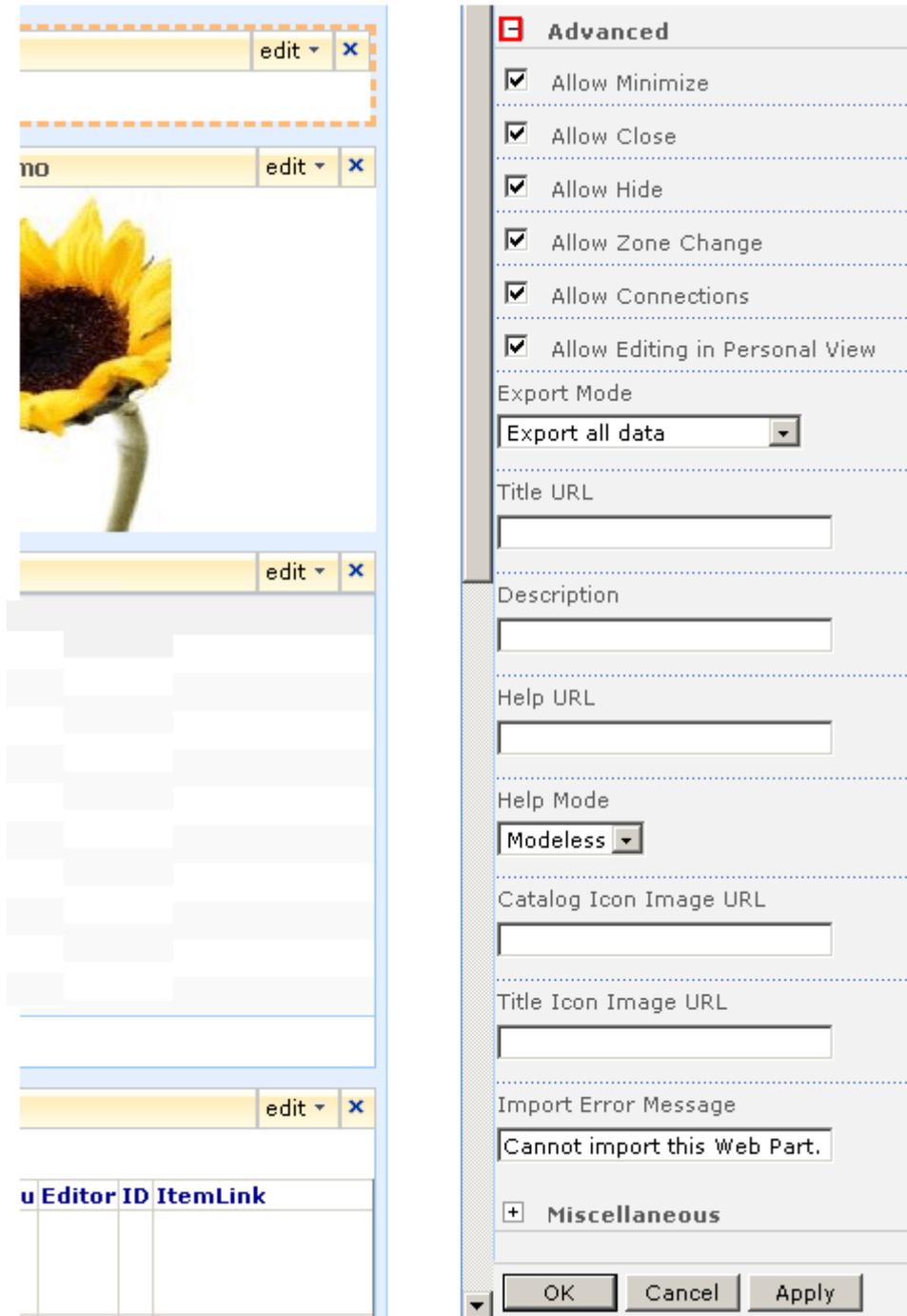


Figure 6: Modifying Advanced Settings

The following parameters are available inside this screen:

- **Allow Minimize** – select this checkbox if you wish to allow minimizing of the Web Part
- **Allow Close** - select this checkbox if you wish to allow closing of the Web Part
- **Allow Hide** - select this checkbox if you wish to allow hiding of the Web Part
- **Allow Zone Change** - select this checkbox if you wish to allow zone change for the Web Part
- **Allow Connections** - select this checkbox if you wish to allow Web Part connections
- **Allow Editing in Personal View** - select this checkbox if you wish to allow minimizing of the Web Part

- **Export Mode** – use the desired export mode from this pull down menu
 - **Do not allow** – choose this option if you wish to disallow the export to the users
 - **Non-sensitive data only** - choose this option if you wish to allow exporting of the non sensitive data
 - **Export all data** - choose this option if you wish to allow the export of all data
- **Title URL** – field for entering the title URL
- **Description** - field for entering the description
- **Help URL** field for entering the help URL
- **Help Mode** – pull down menu for choosing the desired help mode

4.4 Modifying Miscellaneous Settings

In order to start modifying miscellaneous settings for the “Stock Quotes” web part, choose option “Modify Shared Web Part” from the main menu and click on the “+” symbol next to the “Miscellaneous” label.

Figure 7: Modifying Miscellaneous Settings

The following parameters are available inside this screen:

- **Setup Header** – field for entering the contents of the header as seen by the end users
- **Setup Footer** – field for entering the contents of the footer as seen by the end users
- **Use Default Web Service** – select this checkbox if you wish to use the default web service
Note: this feature will be implemented at a later date.
- **Stock Template** – this is the field for defining the main contents of the web part; the template can include full HTML as well as the following parameters for displaying the stock information:

Available Symbols

\$(StockSymbol)
 \$(LastTradePrice)
 \$(LastTradeDate)
 \$(LastTradeTime)
 \$(PriceChange)

\$(DayOpen)
\$(DayHigh)
\$(DayLow)
\$(Volume)
\$(MarketCap)
\$(PrevClose)
\$(PercentChange)
\$(52WeekRange)
\$(EPS)
\$(PE)
\$(CompanyName)

Note: Please visit the SharePoint Forums for sample templates.

- **Stock Symbols** – field for defining the stock symbols; Stock Symbols must be comma separated. (e.g. “MSFT” if you want to pull in the Microsoft stock symbol or “MSFT, DELL” if you want to pull in stock information for both MSFT and DELL).

5 EXPORTING STOCK QUOTES SETTINGS

In order to start exporting the “Stock Quotes” web part settings, choose option “Export...” from the main menu.



You don't have to display stock information for multiple stocks if you don't want to - you can use the module to just display stock information for just one particular stock:

Figure 8: Exporting the Web Part settings (step 1/3)

The following screen will be displayed.

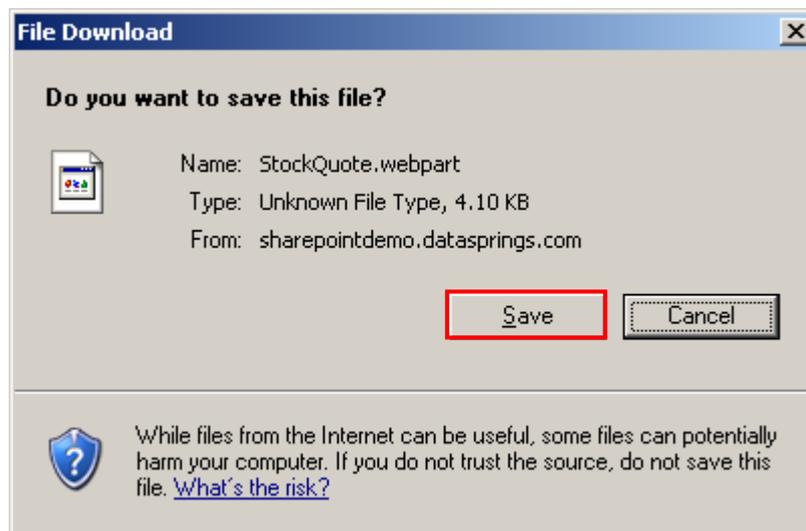


Figure 9: Exporting the Web Part settings (step 2/3)

Click on the “Save” button to choose the file name and location and the following dialog will be displayed.

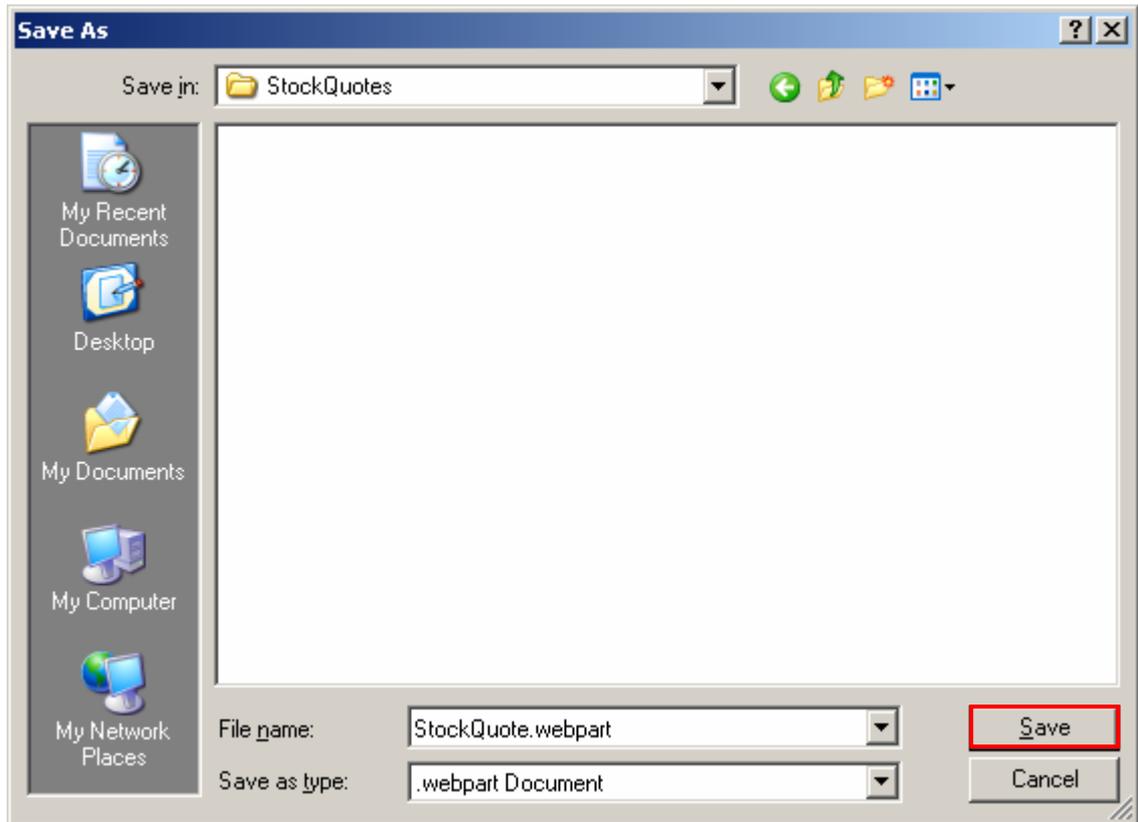


Figure 10: Exporting the Web Part settings (step 3/3)

Choose the desired location and the name of the exported file and click on the “Save” button in order to complete the export procedure.

5.1 Importing the Stock Quotes Settings

In order to import the Stock Quotes settings once you have performed the export (**note:** see previous section), choose option “Edit Page” from the “Site Actions” menu.

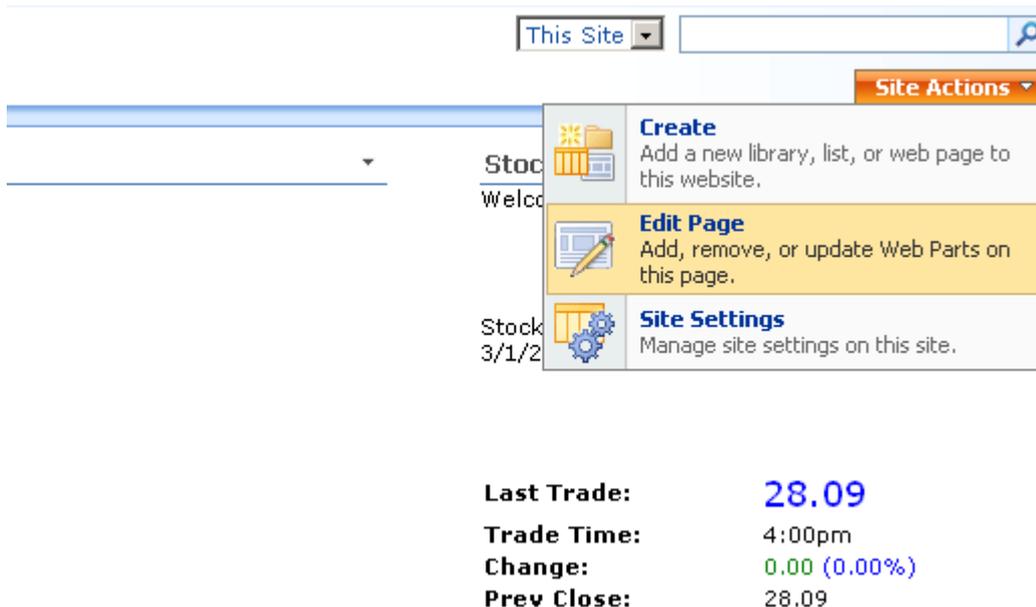


Figure 11: Importing the Stock Quotes Settings (step 1/5)

The following screen will be displayed.

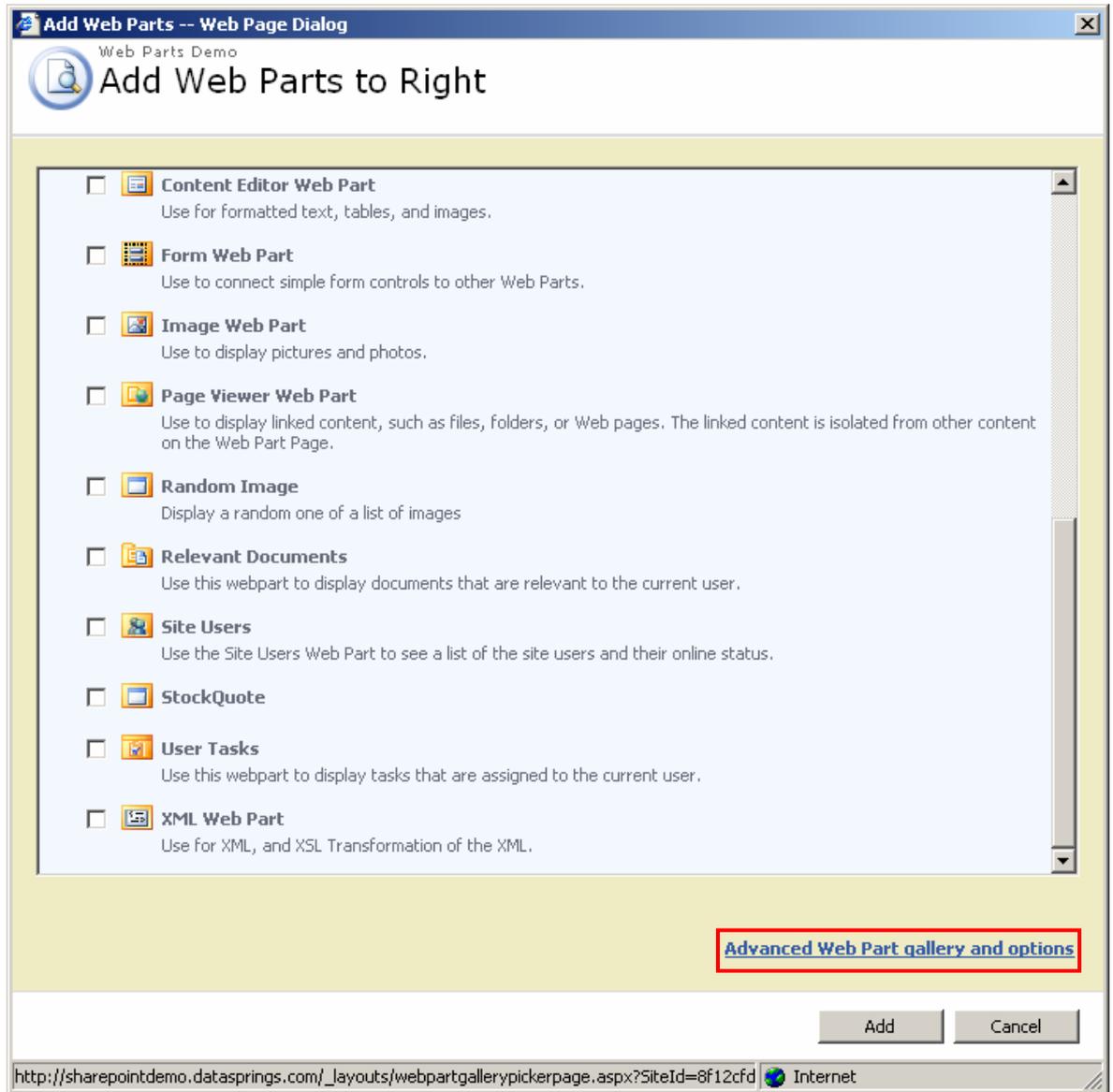


Figure 12: Importing the Stock Quotes Settings (step 2/5)

Click on the "Advanced Web Part Gallery and options" at the bottom of the screen and the following screen will be displayed.

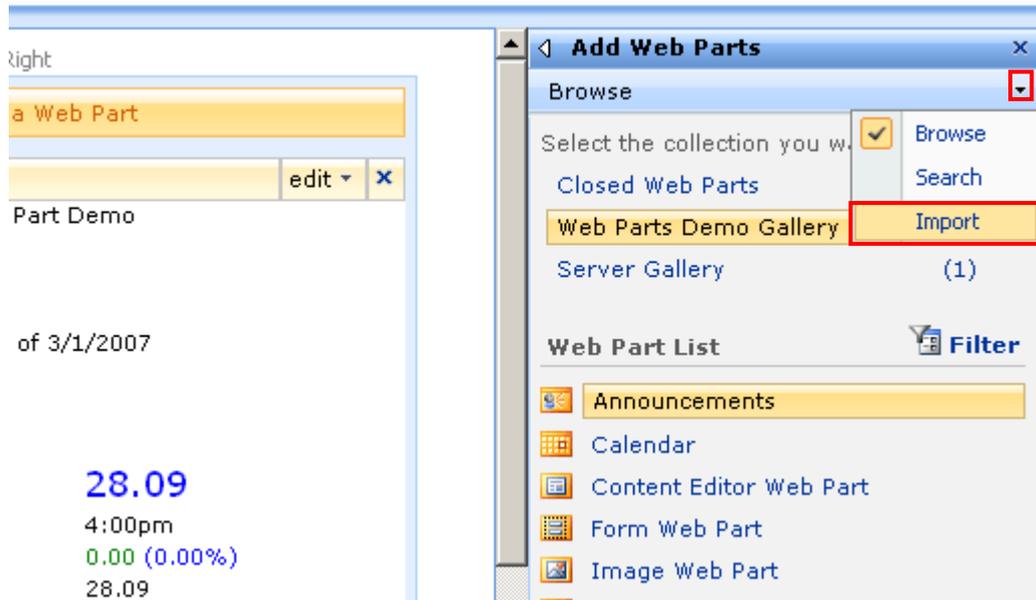


Figure 13: Importing the Stock Quotes Settings (step 3/5)

Click on the arrow next to the “Browse” label in order to open the menu and then choose the “Import” option. The following screen will be displayed.

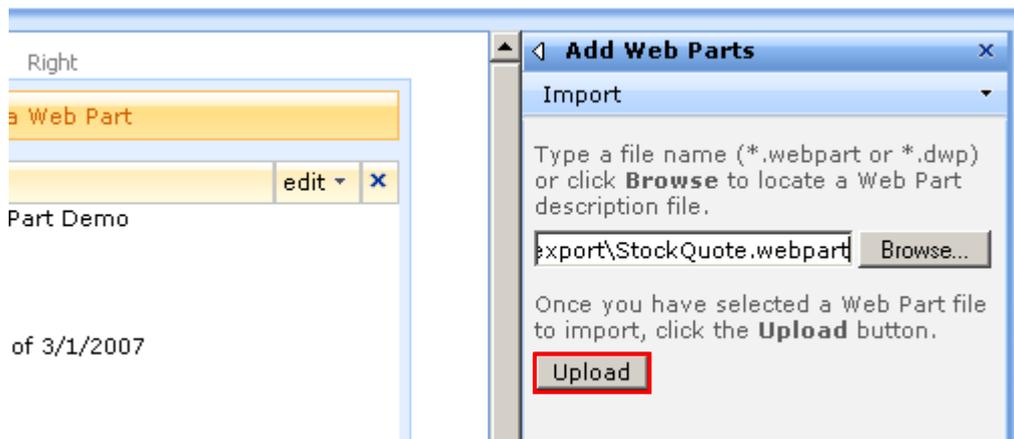


Figure 14: Importing the Stock Quotes Settings (step 4/5)

Click on the “Browse” button inside this screen to locate the exported file and then click on the “Upload” button in order to upload it. The following screen will be displayed.

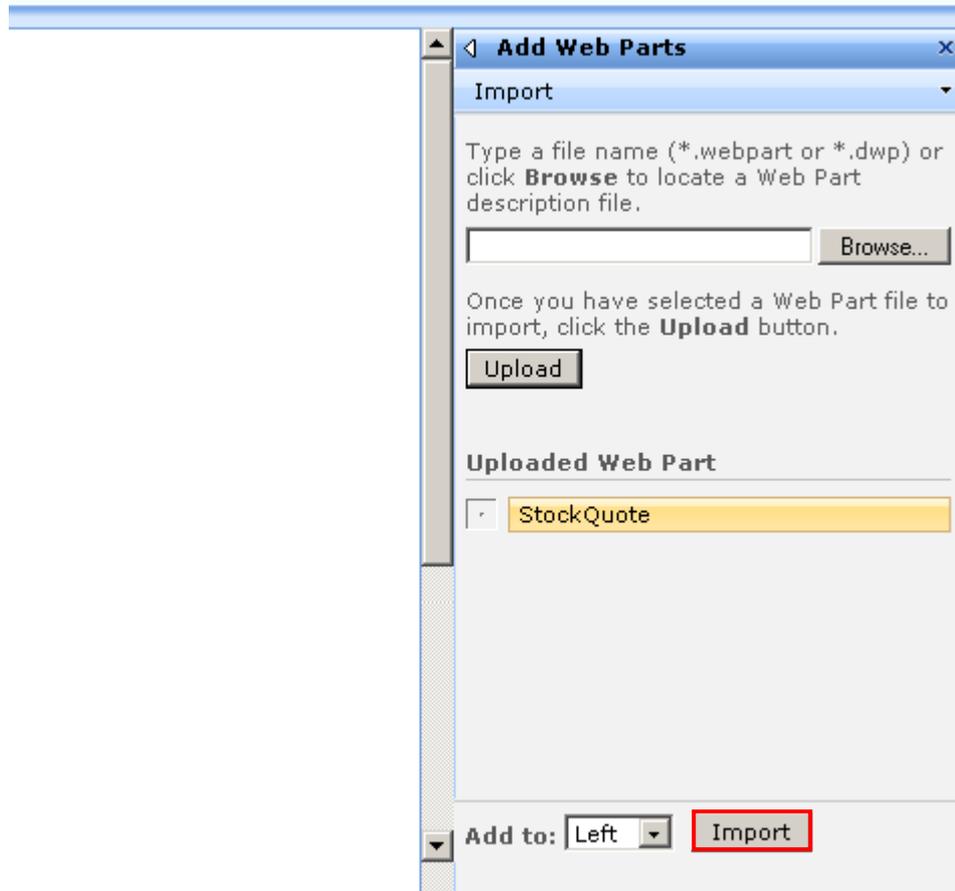


Figure 15: Importing the Stock Quotes Settings (step 5/5)

The “Uploaded Web Part” part of the screen will display information about the uploaded StockQuote. Click on the “Import” button at the bottom to complete the procedure of importing web part settings and configuration.”