

# 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 Proce
- 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"



#### 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 Admi	inistration pplication Management		
	Central Administration > Operations > Solution Management > Solution Properties > I Deploy Solution	Deploy Solution	
Server Farm ? Configuration ?	Use this page to deploy the solution.		
Not Complete See <u>administrator task list</u> for more information View All Site Content	Solution Information Information on the solution you have chosen to deploy.	Name:     datasprings_stockquote.wsp       Locale:     0       Deployed To:     http://intranet/       Deployment Status:	
Central Administration • Operations • Application Management	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 C At a specified time: 7/15/2007 IIII 1 PM V 00 V	
Shared Services Administration • SSP01 @ Recycle Bin	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:	

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.

		Site Actions 🔻
		Exit Edit Mode 🗙
	▲ 🛛 Stock Quotes	×
	+ Appearance	
	🛨 Layout	
h Dort edit v X	± Advanced	
n the tool pane and then click	+ Miscellaneous	

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.

	📥 \land Stock Quotes 🛛 🗙 🗡
	Appearance
	Title
o Part edit • ×	Stock Quotes
the tool pane and then click	Height
	Should the Web Part have a fixed height?
	C Yes Pixels 🔹
edit - ×	• No. Adjust height to fit zone.
CC	Width
レモ	Should the Web Part have a fixed width?
MA SC	O Yes Pixels -
C C	• No. Adjust width to fit zone.
	Chrome State
play stock information for	O Minimized
play stock information for ck:	• Normal
	Chrome Type
	Default

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.

🗄 La	yout
🗖 Hic	lden
Directio	n
None	•
Zone Right	-
Zone In	idex
+ Ad	vanced
+ Mis	scellaneous
🚽 🗆 ок	Cancel Apply

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:
  - o Left to Right
  - o 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.

adit v X	Advanced
	Allow Minimize
	Allow Close
no edit • ×	Allow Hide
	Allow Zone Change
AND A LOCAL OF	Allow Connections
	Allow Editing in Personal View
and the second s	Export Mode
	Export all data
	Title URL
edit • ×	Description
	Help URL
	Help Mode
	Modeless 💌
	Catalog Icon Image URL
	Title Icon Image URL
edit - ×	Import Error Message
	Cannot import this Web Part.
u Editor ID ItemLink	+ Miscellaneous

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
  - o 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
  - o 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.

Miscellaneous
Setup Header
This is a header
Setup Footer
This is a footer
☑ Use Default Web Service? Stock Template
Stock Symbols
MSFT
OK Cancel Apply

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) \$(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.

File Down	load X
Do you	want to save this file?
	Name: StockQuote.webpart
	Type: Unknown File Type, 4.10 KB
	From: sharepointdemo.datasprings.com
	<u>S</u> ave Cancel
1	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not save this file. <u>What's the risk?</u>

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.

Save As					? ×
Save jn:	C StockQuotes		•	) 🤣 📂 🖽-	
My Recent Documents Desktop					
My Documents					
My Computer					
Mu Network	File name:	StockQuote webpart		<b>_</b>	Save
Places	Save as <u>type</u> :	.webpart Document			Cancel

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.

Web Parts Demo   Add Web Parts to Right     Image Content Editor Web Part   Use for formatted text, tables, and images.   Image Veb Part   Use to connect simple form controls to other Web Parts.   Image Web Part   Use to display pictures and photos.   Image Vebewer Web Part   Use to display pictures and photos.   Image Vebewer Web Part   Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.   Image Relevant Documents   Use this webpart to display documents that are relevant to the current user.
<ul> <li>Content Editor Web Part Use for formatted text, tables, and images.</li> <li>Form Web Part Use to connect simple form controls to other Web Parts.</li> <li>Image Web Part Use to display pictures and photos.</li> <li>Page Viewer Web Part Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.</li> <li>Random Image Display a random one of a list of images</li> <li>Relevant Documents Use this webpart to display documents that are relevant to the current user.</li> </ul>
<ul> <li>Content Editor Web Part Use for formatted text, tables, and images.</li> <li>Form Web Part Use to connect simple form controls to other Web Parts.</li> <li>Image Web Part Use to display pictures and photos.</li> <li>Page Viewer Web Part Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.</li> <li>Random Image Display a random one of a list of images</li> <li>Relevant Documents Use this webpart to display documents that are relevant to the current user.</li> </ul>
<ul> <li>Content Editor Web Part Use for formatted text, tables, and images.</li> <li>Form Web Part Use to connect simple form controls to other Web Parts.</li> <li>Image Web Part Use to display pictures and photos.</li> <li>Page Viewer Web Part Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.</li> <li>Random Image Display a random one of a list of images</li> <li>Relevant Documents Use this webpart to display documents that are relevant to the current user.</li> </ul>
<ul> <li>Form Web Part Use to connect simple form controls to other Web Parts.</li> <li>Image Web Part Use to display pictures and photos.</li> <li>Page Viewer Web Part Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.</li> <li>Random Image Display a random one of a list of images</li> <li>Relevant Documents Use this webpart to display documents that are relevant to the current user.</li> </ul>
<ul> <li>Image Web Part Use to display pictures and photos.</li> <li>Page Viewer Web Part Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.</li> <li>Random Image Display a random one of a list of images</li> <li>Relevant Documents Use this webpart to display documents that are relevant to the current user.</li> </ul>
<ul> <li>Page Viewer Web Part Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.</li> <li>Random Image Display a random one of a list of images</li> <li>Relevant Documents Use this webpart to display documents that are relevant to the current user.</li> </ul>
<ul> <li>Random Image         Display a random one of a list of images     </li> <li>Relevant Documents         Use this webpart to display documents that are relevant to the current user.     </li> </ul>
Relevant Documents     Use this webpart to display documents that are relevant to the current user.
E Shallows
Use the Site Users Web Part to see a list of the site users and their online status.
StockQuote
User Tasks Use this webpart to display tasks that are assigned to the current user.
Use for XML, and XSL Transformation of the XML.
Advanced Web Part gallery and options
Add Cancel

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.

light			1	Add Web Parts			×
				Browse			J
a Web Part				Select the collection you w	~	Browse	
	edit 🝷	×		Closed Web Parts		Search	
Part Demo				Web Parts Demo Gallery		Import	
				Server Gallery		(1)	
of 3/1/2007				Web Part List		🔄 Filte	er
				Announcements			
				🧰 Calendar			
28.09				🔲 Content Editor Web Par	rt		
4:00pm				🗐 Form Web Part			
0.00 <mark>(0.00%)</mark> 28.09				📓 Image Web Part			

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.

🔺 🛛 Add Web Parts
Import
Type a file parce (* webpart or * dw
or click <b>Browse</b> to locate a Web Part description file.
export\StockQuote.webpart Browse.
Once you have selected a Web Part to import, click the <b>Upload</b> button.

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 upload it. The following screen will be displayed.

	Add Web Parts ×     ×     ×
	Import 🔹
	Type a file name (*.webpart or *.dwp) or click <b>Browse</b> to locate a Web Part description file.
	Browse
	Once you have selected a Web Part file to import, click the <b>Upload</b> button. <b>Upload</b>
	Uploaded Web Part
	StockOuote
-	Add to: Left 💽 Import

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."