Stock Quotes

User Guide

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1   INTRODUCTION

Stock Quotes provides you with an easy method of displaying up to date financial and stock information on your DotNetNuke portal.

You can utilize the module in multiple ways, displaying stock information for just one particular stock, or adding multiple stocks to the module. You can configure the layout of the module, 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 module if they wish.

Features:

- Stock Quotes for DotNetNuke 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 allow the user to add their own stocks to the list. If they add their own stocks they will be displayed right underneath the stocks the administrator has defined.
- Optionally set a header or footer to the stock module
- Get creative! Add links back to financial institutions for particular stocks and add images, graphics, detailed stock information with each stock symbol.

2 INSTALLATION PROCEDURE

Included in your download are either one (If you only purchased the PA) or two (If you purchased the PA and Source Code) zip files. One zip file is the source code to the application, and the other zip file is the module which you can upload to your site.

When you extract the files, you will notice that it extracts two zip files (**note:** only one if you just purchased the PA).

- **DataSprings_StockQuote_ModulePA.zip** - file for installing "Stock Quotes" with your DNN

- **DataSprings_StockQuote_Source.zip -** source zip file you can use in order to make any changes to the application (**note:** meant for advanced users)

In order to install your "Stock Quotes" module, login with an account to your DNN site as a host or administrator account. Once logged in, Navigate to the Host menu item, and click on the "Module Definition".
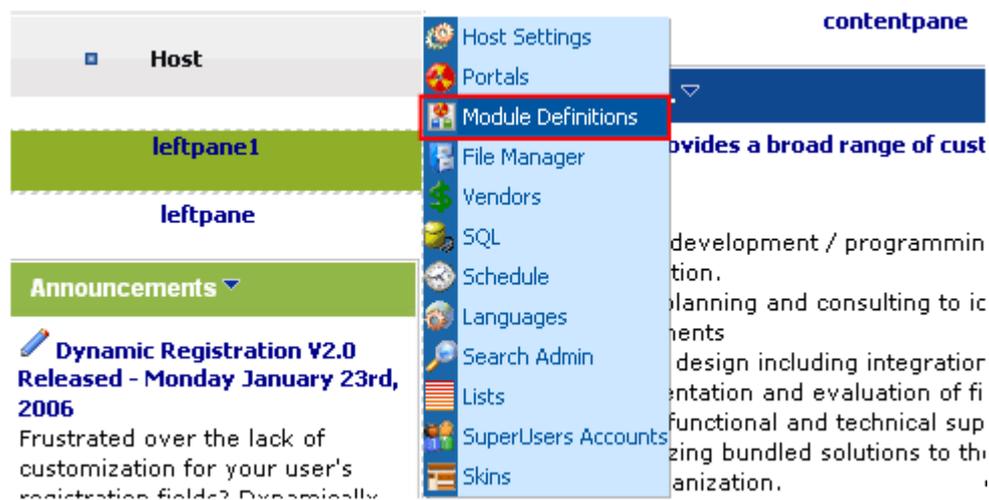
Figure 1: Installation procedure (step 1/6)

The following screen will be displayed.
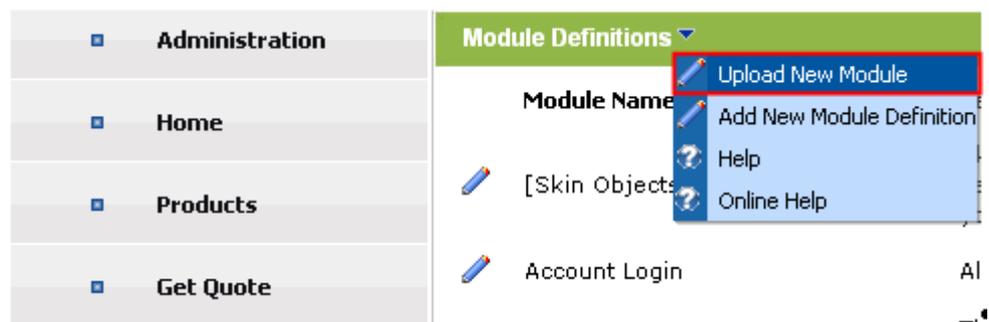
Figure 2: Installation procedure (step 2/6)

Click on the "Upload New Module" to continue installing "Stock Quotes" and the following screen will be displayed.
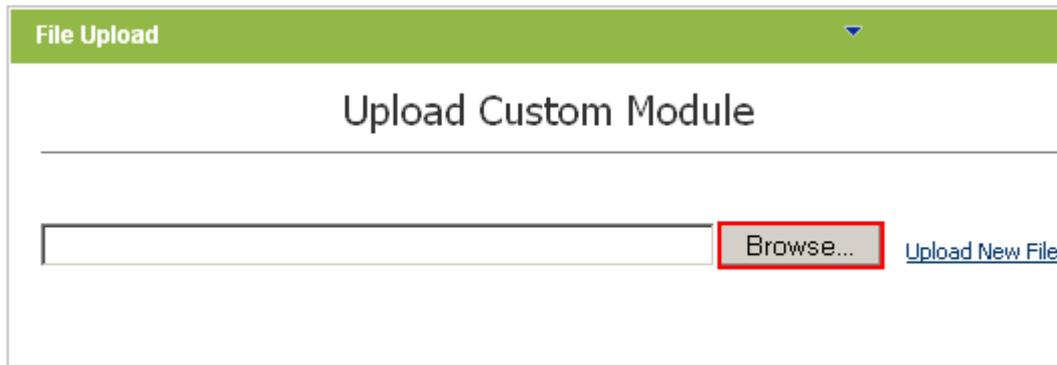
Figure 3: Installation procedure (step 3/6)

Click on the "Browse" button and the dialog window for locating the installation file
"**DataSprings_StockQuote_ModulePA.zip**" will be displayed.
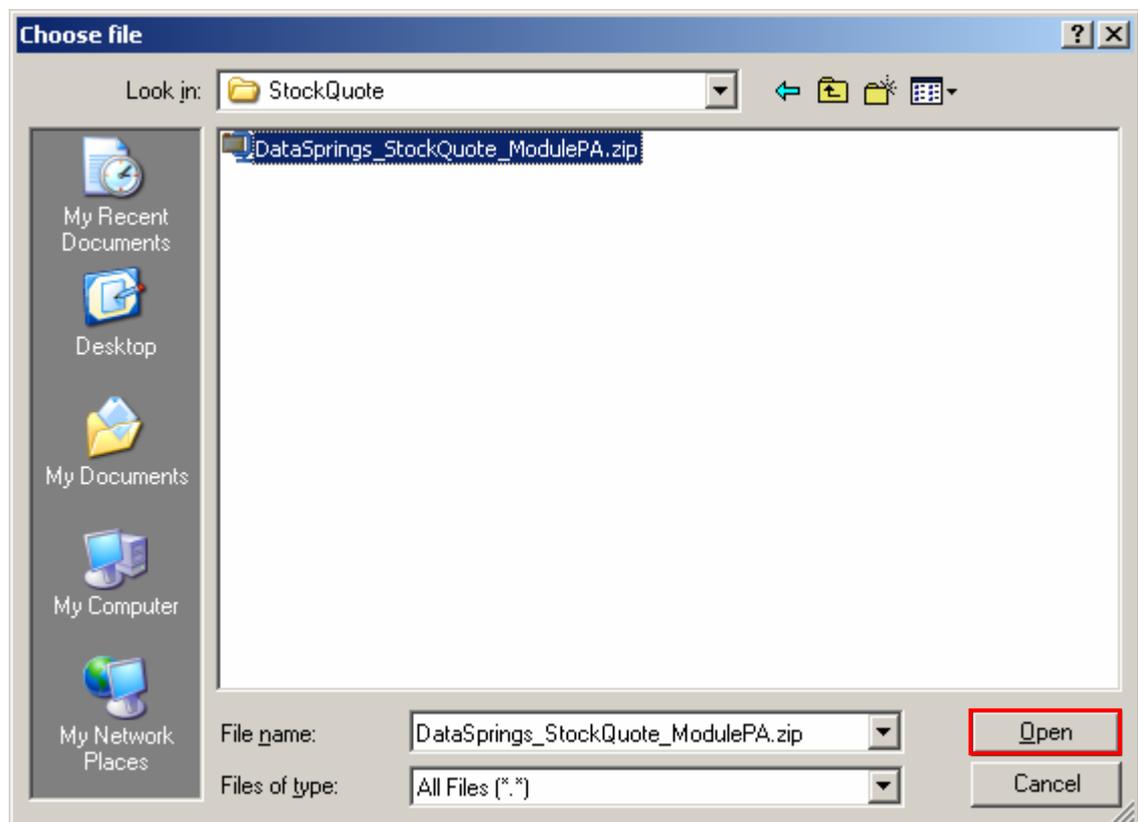
Figure 4: Installation procedure (step 4/6)

Locate the "**DataSprings_StockQuote_ModulePA.zip**" and click on the "Open" button. The
following screen will be displayed.

Figure 5: Installation procedure (step 5/6)

Select the "**DataSprings_StockQuote_ModulePA.zip**" file and click on the "Upload New File" link. The installation will begin and in couple of moments the screen informing you on successful completion will be displayed.

Figure 6: Installation procedure (step 6/6)

Note: please keep track of any errors that appear during the installation. These errors can be helpful if your module has problems.

3   ADDING STOCK QUOTES MODULE TO A PAGE

In order to add "Stock Quotes" module to a desired page follow these steps:

1. Select the "Add New Module" radio button

2. Choose "Stock Quotes" from the "Module" pull down menu

3. Click on the "Add" link (or the arrow icon).
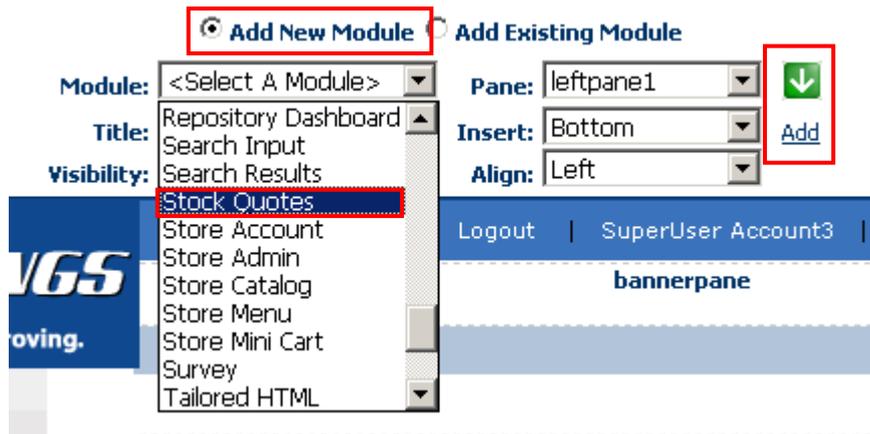
Figure 7: Adding a module to a page

The "Stock Quotes" module will be added to the page. Click on the arrow next to the title of the module in order to open the main menu.
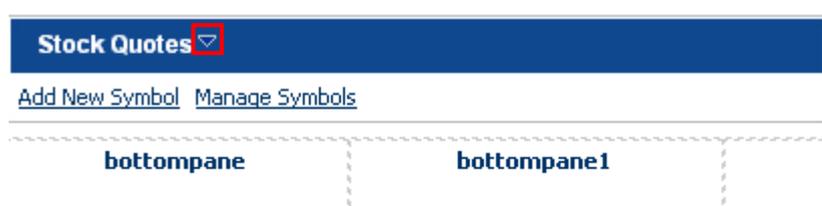
Figure 8: Opening the module main menu

Note: see section 4 for further information on main menu options.

4   STOCK QUOTES MAIN MENU

This section of the document will give the definition of the "Stock Quotes" main menu options. In order to start using the main menu, click on the arrow next to the title "Stock Quotes".

Figure 9: Opening the main menu

The following options are available inside this screen:

- **Add New Symbol** – option for managing template (see section 5)
- **Manage Symbols** – option for managing the search options (see section 6)
- **Help** – this user guide
- **Print** – option for printing the contents of the page
- **Settings** – option for managing settings (see section 7)
- **Delete** – option for deleting a module (see section 8)
- **Move** – option for placing the module in the desired part of the page:
    - o   Move To leftpane
    - o   Move To bannerpane
    - o   Move To contentpane
    - o   Move To rightpane
    - o   Move To bottompane
    - o   Move To bottompane1
    - o   Move To bottompane2

5 ADDING A NEW SYMBOL

In order to add a new symbol, choose option "Add New Symbol" from the main menu.
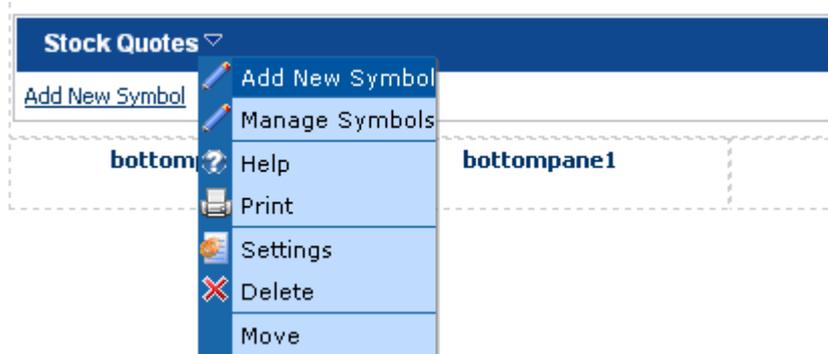
Figure 10: Adding a new symbol (step 1/2)

The following screen will be displayed.
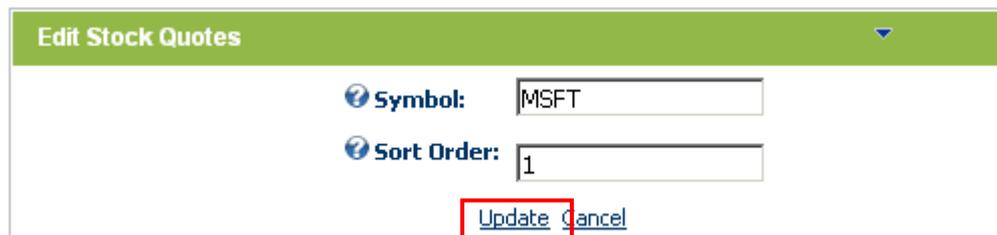
Figure 11: Adding a new symbol (step 2/2)

The following parameters are available inside this screen:

- **Symbol** – field for entering the stock quote symbol (**e.g.** "MSFT")
- **Sort Order** – field for setting the desired sort order for the symbol (**e.g.** "1")

After setting the desired parameters, click on the "Update" link and the new symbol will be added.

6   MANAGING SYMBOLS

In order to start managing the symbols, choose option "Manage Symbols" from the main menu.

Figure 12: Choosing option "Manage Symbols"

The following screen will be displayed.
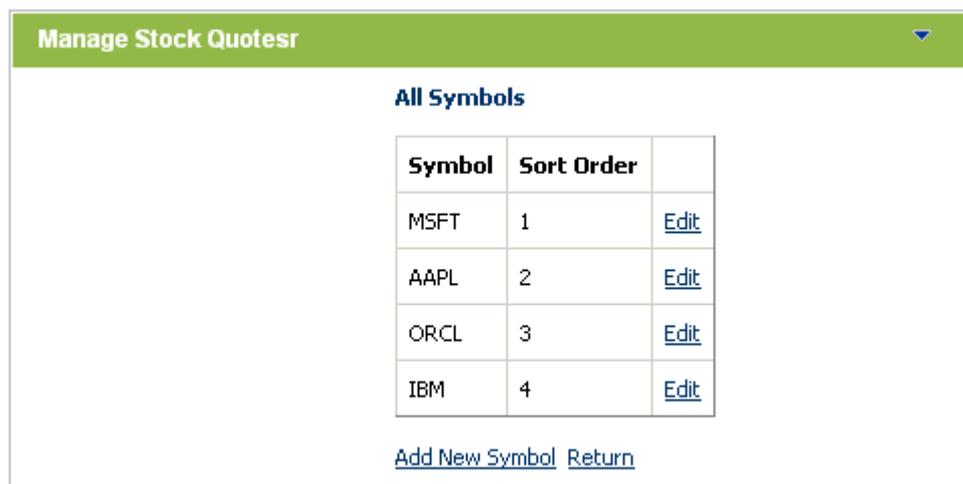
Figure 13: Managing the symbols

The following parameters and options are available inside this screen:

- **Symbol –** field displaying the label defined for the symbol
- **Sort Order** – field displaying the sort order for the symbol
- **Edit** – option for editing an existing symbol
- **Add New Symbol** – option for adding a new symbol (see section 5)
- **Return** – option for returning to the main screen

7 MANAGING STOCK QUOTES SETTINGS

In order to start managing the module settings, choose option "Settings" from the main menu.
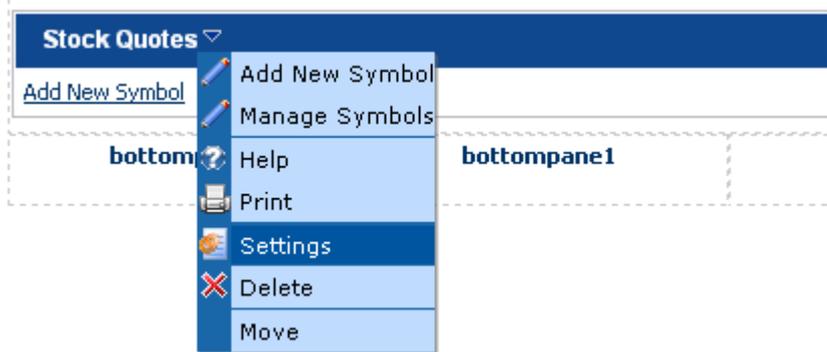
Figure 14: Choosing option "Settings" from the main menu

The following screen will be displayed.

Figure 15: Choosing option "Stock Quotes Settings" from the main menu

Click on the "+" symbol next to the "Stock Quotes Settings" label in order to display the settings for this module. The following screen will be displayed (**note:** the screen is presented with 3 screen shots).
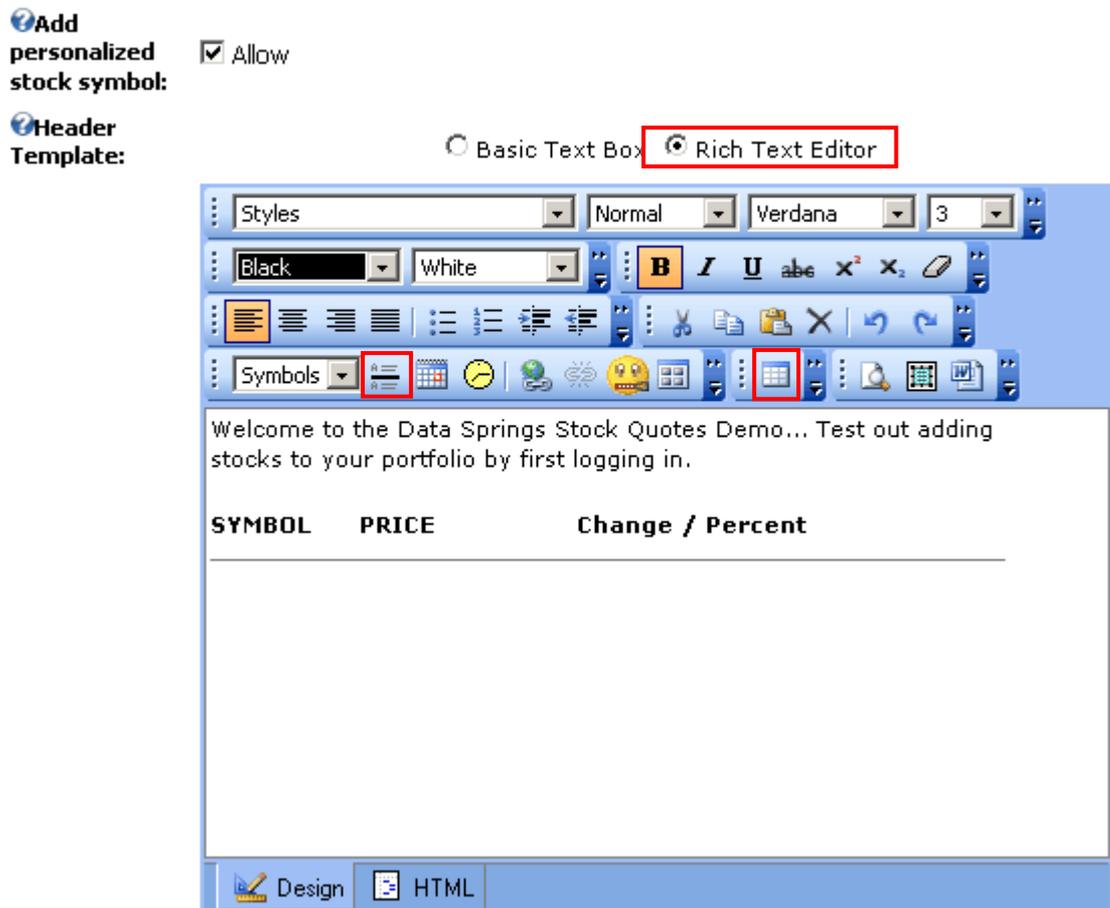
Figure 16: Managing Stock Quotes – Header

The first part of the screen is used for defining the header of the screen. The following parameters are available inside the first part of the screen:

- **Add personalized stock symbol** – check this box if you would like to allow users to add their own stock symbols; if this setting is enabled then users will also see an 'Add Symbols' and 'Manage Symbols' link once they sign in; they can then add/remove/manage their own stock symbols that will appear within the module once the user is signed in (see section 0).

- **Header Template** – text area for defining the contents of the header; note that you can use the "Insert Table" option to control the layout of the information (**e.g.** create the table headings) or the Rule element to divide the information

- **Basic Text Box** – click on this radio button if you want to disable the WYSIWYG editor and work directly in HTML (**note:** meant for advanced users)

- **Rich Text Editor** – choose this option to enable the WYSIWYG editor and use various formatting options

Figure 17: Managing Stock Quotes – Content

The second part of the screen is used for defining the contents of the screen. The following parameters are available inside the second part of the screen:

- **Basic Text Box** – click on this radio button if you want to disable the WYSIWYG editor and work directly in HTML (**note:** meant for advanced users)

- **Rich Text Editor** – choose this option to enable the WYSIWYG editor and use various formatting options

- **Content Template** – text area for defining the main contents for the stock quotes

- **Available Symbols** – list of available symbols which can be used in order to display various information about the stock quotes such as "**$(LastTradePrice)**" The full list is available here:

  o **$(StockSymbol)** – the symbol for this stock

  o **$(LastTradePrice)** – the last trading price for this stock

  o **$(LastTradeDate)** – use this parameter to display the date of the last trade

  o **$(LastTradeTime)** – use this parameter to display the time of the last trade

  o **$(PriceChange)** - use this parameter to display the change in price

  o **$(DayOpen)** – use this parameter to display the price of the stock quote at the opening of the market

  o **$(DayHigh)** - use this parameter to display the highest price during the day

  o **$(DayLow)** - use this parameter to display the lowest price during the day

  o **$(Volume)** - use this parameter to display the information about the number of stocks that were traded during the day

- o **$(MarketCap) -** use this parameter to display the total value of a company in the stock market (total shares outstanding x price per share).

- o **$(PrevClose)** - use this parameter to display the information about the previous price of the stock quotes

- o **$(PercentChange)** - use this parameter to display the information about the changes to the stock quotes value in percents

- o **$(52WeekRange)** - use this parameter to display the information about the range of stock quotes for the last 52 weeks

- o **$(EPS)** - use this parameter to display the information about earnings per share

- o **$(PE)** - use this parameter to display the information about price to earnings ratio

- o **$(CompanyName)** – use this parameter to display information about the company name

Figure 18: Managing Stock Quotes – Footer

The third part of the screen is used for defining the contents of the footer area. The following parameters are available inside the second part of the screen:

- **Basic Text Box** – click on this radio button if you want to disable the WYSIWYG editor and work directly in HTML (**note:** meant for advanced users)

- **Rich Text Editor** – choose this option to enable the WYSIWYG editor and use various formatting options

- **Footer Template** – text area for defining the footer

After setting the desired parameters, click on the "Update" button in order to save the changes. The screen shot below demonstrates the layout of the page as seen by the end users.
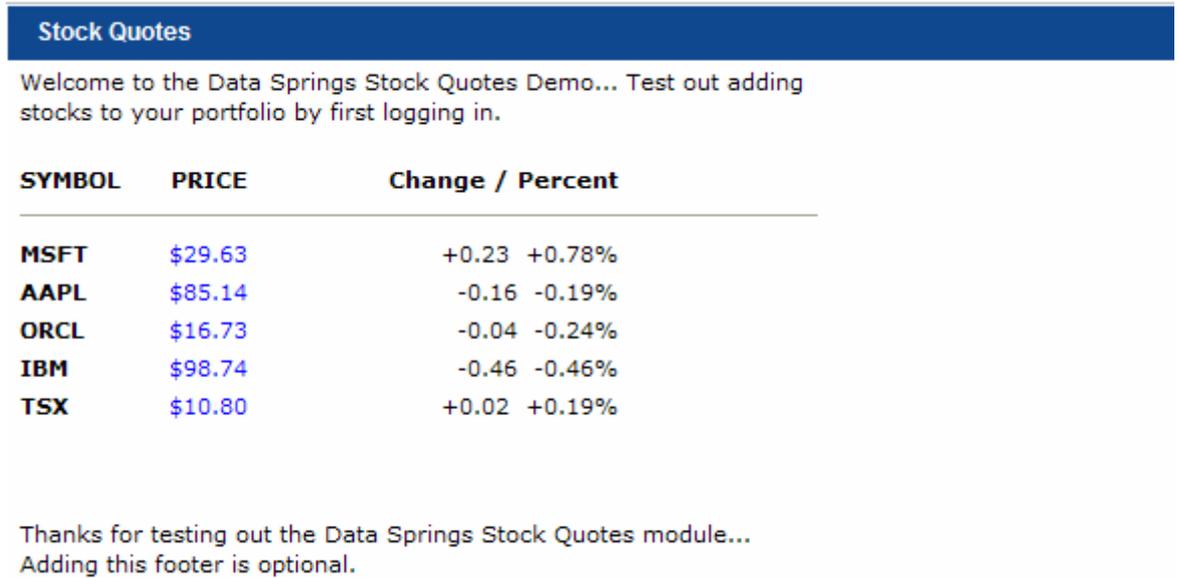
Figure 19: Example of the page as seen by the end users

7.1 Allowing Registered Users to Add and Manage the Symbols

The "Stock Quotes" module gives you the opportunity to allow your registered users to add and manage the stock quote symbols.

In order to allow registered users to add and manage their own symbols, select the "Add Personalized Stock Symbol" checkbox within the "Stock Quotes Settings" page.
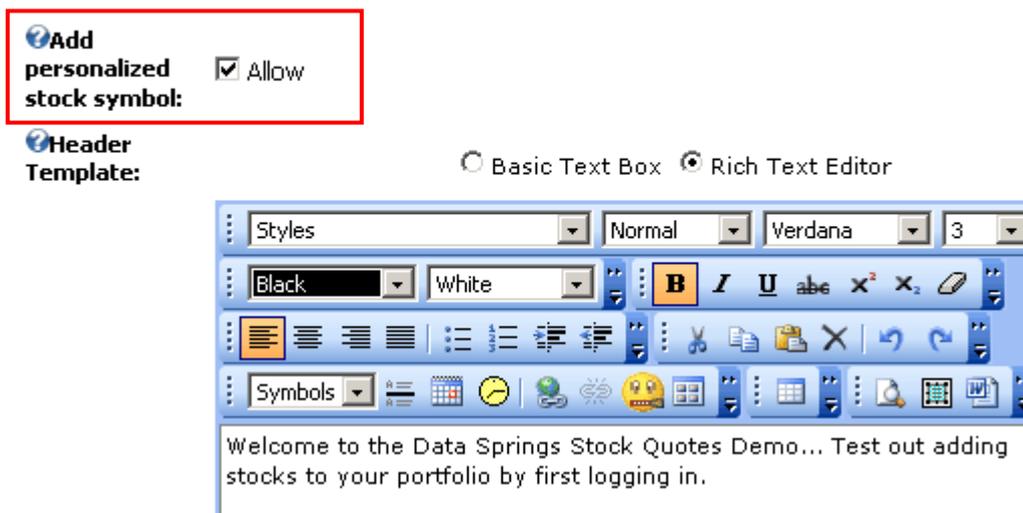

Figure 20: Allowing Registered Users to Add and Manage the Symbols

Once you select this option and click on the "Update" link to save the changes, the "Stock Quotes". The main "Stock Quotes" screen will contain options for adding and managing symbols (**note:** your users must login prior to being able to see and use these options).

Figure 21: Options for registered users

The following options will be available:

- **Add New Symbol** – see section 7.1.1
- **Manage Symbols** – see section 7.1.2

7.1.1   Adding a new symbol from the perspective of a registered user

In order to add a new symbol, your registered user must login and click on the "Add New Symbol" link.

Figure 22: Adding a new symbol from the perspective of a registered user (step 1/3)

The following screen will be displayed.

Figure 23: Adding a new symbol from the perspective of a registered user (step 2/3)

The following parameters are available inside this screen:

- **Symbol** – the user should enter the desired symbol inside this field
- **Sort Order** – the user should enter the desired sort order for the symbol inside this screen

After defining these parameters, the user should click on the "Update" link in order to save the changes. The new symbol will be added.
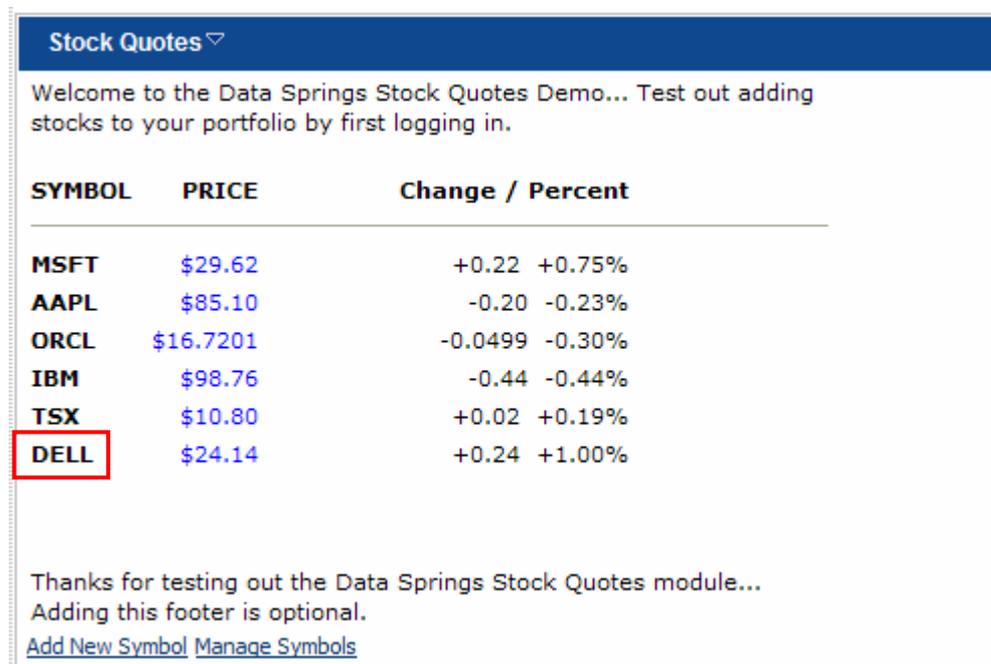
Figure 24: Adding a new symbol from the perspective of a registered user (step 3/3)

7.1.2   Managing Symbols from the Perspective of Registered Users

In order to start managing their symbols, your registered user must login and click on the "Manage Symbols" link.

Figure 25: Managing the symbols from the perspective of a registered user (step 1/2)

The following screen will be displayed.

Figure 26: Managing the symbols from the perspective of a registered user (step 2/2)

The following parameters and options are available inside this screen:

- **Symbol** – field displaying the label defined for the symbol
- **Sort Order** – field displaying the sort order for the symbol
- **Edit** – option for editing an existing symbol
- **Add New Symbol** – option for adding a new symbol (see section 7.1.1)
- **Return** – option for returning to the main screen

8 DELETING THE MODULE

In order to delete the module, choose option "Delete" from the main menu.
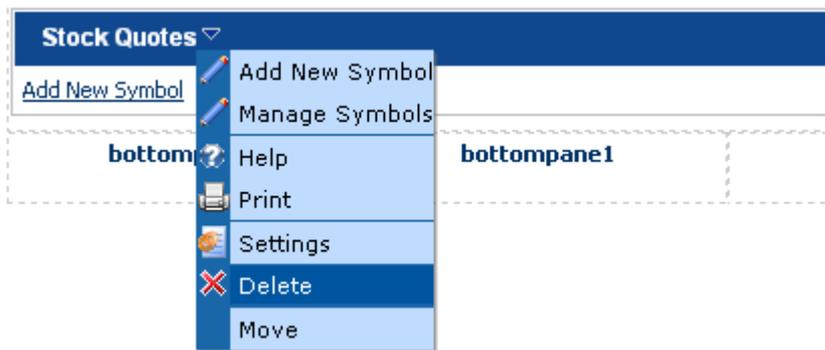
Figure 27: Deleting the module (step 1/2)

The following confirmation dialog will be displayed.
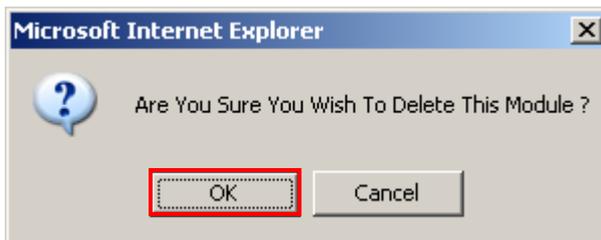
Figure 28: Deleting the module (step 2/2)

Click on the "OK" button to confirm the deletion and the module will be deleted.