

## **Stocks & Shares – Installation & Maintenance Guide**

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## HISTORY OF CHANGE

<b>Version</b>	<b>Description</b>	<b>Date</b>
0.1	Extracted installation instructions from the Stocks_&_Shares_User_Guide.doc - Stuart Coxhead	14/02/2007
1b	Changed versioning scheme Changed front cover. Changed the introduction and scope paragraphs to be more relevant. Added System Overview section - Stuart Coxhead	22/02/2007
1c	Added configuration for OpenStage – Mark Buss	10/03/2007
1d	Changed the setup filename and minor mistakes – Stuart Coxhead	12/03/2007
1e	Changed for version 1.2 Application can now access Stock information on the US, UK and German Exchanges.	24/04/2007

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## 1. INTRODUCTION

This document is the Installation and Maintenance Guide for the Stocks & Shares AGP XML application for the OptiPoint 410/420 and OpenStage 60/80 IP Phone models.

The application has been tested and is available as a prototype for demonstration purposes.

The application will enable the user to access up to date price and performance data on all UK listed stocks from their IP phone. It will also alert the user to price and performance changes of desired stocks, allowing them to act accordingly

### 1.1 Necessary Software & Files

- Stocks\_&\_Shares\_Setup.exe – Self extracting executable
- AGP & Build – Platform on the phone

Stocks\_&\_Shares\_Setup.exe can be found in the IP phone applications folder under

`\vobsIP_Apps_Pool\Server\Stocks&Shares\Installation\Stocks_&_Shares_Setup.exe`

## 2. SCOPE

This document is intended for an administrator installing and setting up the Stocks & Shares Server application.

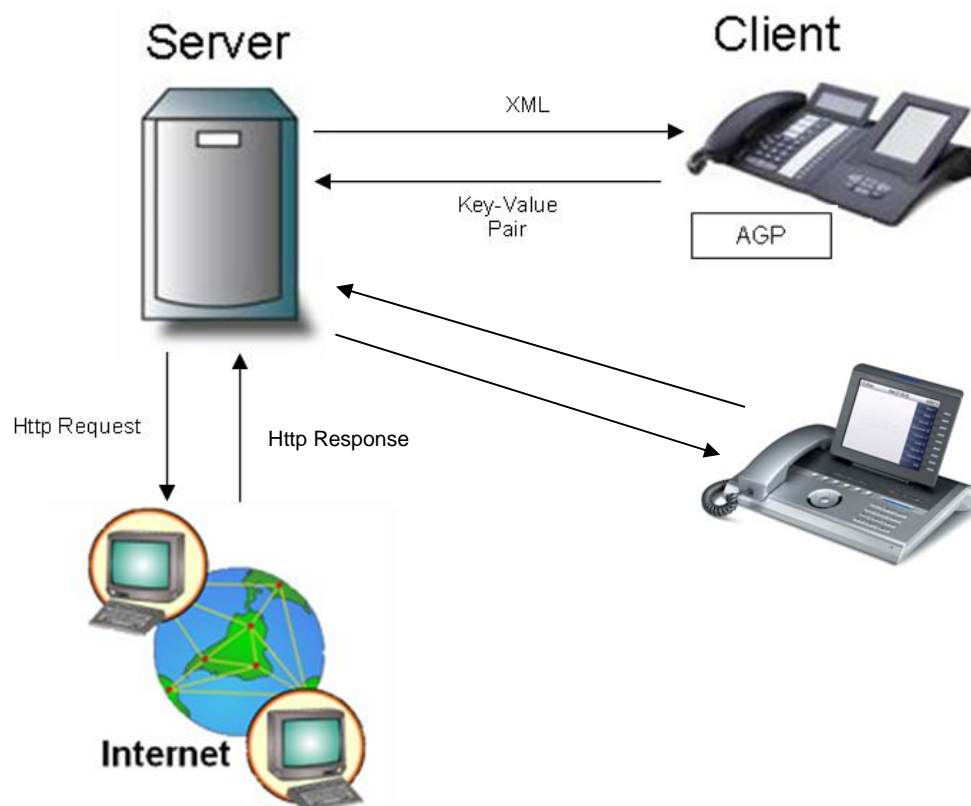
It is assumed the reader has sufficient knowledge about the internet access policy for the network this application is going to be used on, as this application accesses an external source.

This document also provides instructions on configuring the different IP Phone devices to run the Stocks & Shares application.

The Java Runtime Environment 1.5 or later should be installed prior to this installation if not it will be installed automatically by the Stocks & Shares installer.

### 3. SYSTEM OVERVIEW

#### 3.1 Application Architecture



The AGP on the IP phone talks to the Application Server running the Stocks & Shares server via an Http request containing Key-Value pairs, the server then responds with an XML document that can be parsed by the phone to render the display.

The Stocks & Shares Server talks to a web site on the internet, which provides the Stocks & Shares service via http.

#### 3.2 Prerequisites

It is required that

- A connection to the internet, and if relevant, the required proxy settings.

##### 3.2.1 Application Server

Stocks & Shares Server has been tested on the following machine. (The application may work on other windows operating systems and machines; however they have not been tested on.)

- Windows XP with Service Pack 2

- P4 3.2GHz Processor with 504Mb RAM.
- 10Mbps Ethernet Connection.
- The Java Runtime Environment 1.5 or later is required.

## **3.2.2 Phone Handsets**

### **3.2.2.1 OptiPoint 410/420**

To use the Stocks & Shares application on an OptiPoint 410/420 it must also have a DSM/APM. It is highly recommended an APM is used due to the much clearer display.

The phone software must be 5.0.25.0032 or later, with a version of the AGP. However the Stocks & Shares application has been developed and tested on V5R1.34.000 and later with the 2.4 version of the AGP. So a build later than V5R1.34.000 is highly recommended.

Please refer to the OptiPoint documentation on how to install the correct phone firmware.

### **3.2.2.2 OpenStage 60/80**

The phone software on an OpenStage 60/80 must be V0 R7.9.47 or later in order to run Stocks & Shares v1.2.

Please refer to the OpenStage documentation on how to install the correct phone firmware.

## 4. INSTALLATION

The installation can be broken down into the following steps:

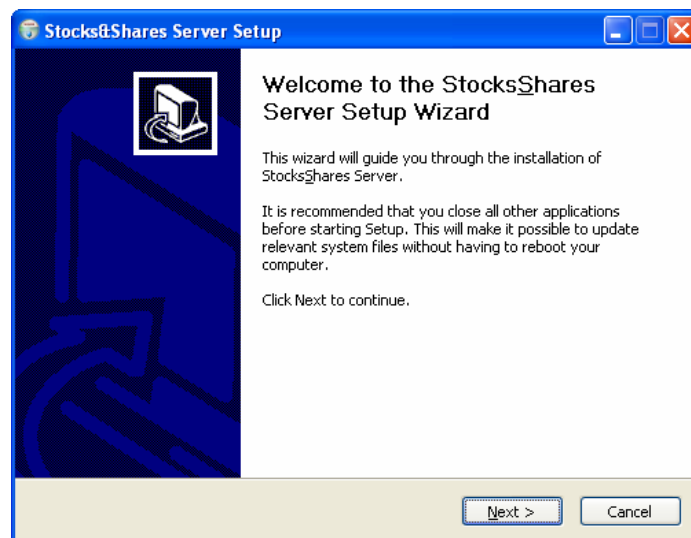
### 4.1 Application executable location

\\vobsIP\_Apps\_Pool\Server\Stocks&Shares\Installation\Stocks\_&\_Shares\_Setup.exe

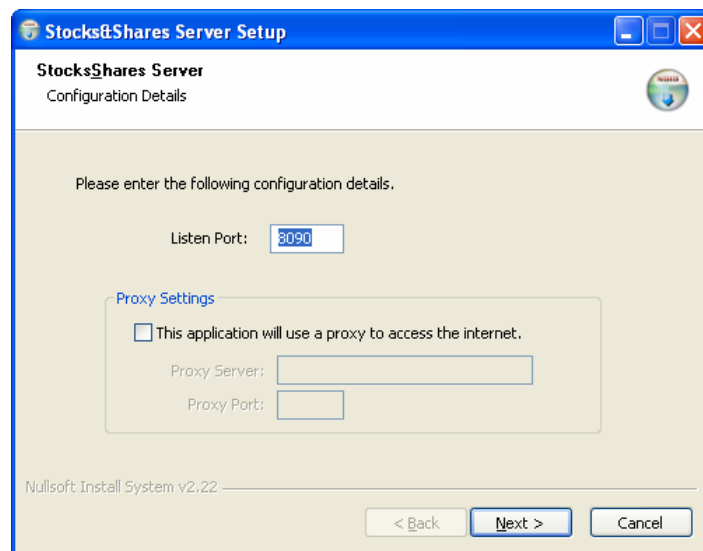
### 4.2 Installing the server

The Stocks & Shares application comes as one complete package. The program actually works as a web server which accepts incoming requests from the phone and returns appropriate responses. To run the server, follow these steps:

1. Locate the executable file "Stocks\_&\_Shares\_Setup.exe" in the directory given above.
2. Copy the file to a local directory on your PC.
3. Double click Stocks\_&\_Shares\_Setup.exe.
4. You will now be taken through the installation wizard.



5. Follow the instructions to install the Stocks & Shares.
6. If you do not have the required Java Runtime Environment you will be prompted to install it, please follow the onscreen instructions to do this.
7. You will be prompted to enter the configuration details of the Stocks & Shares server. The listen port is the port the server will operate on, and the one you should give the phones. If the application server is operating in a network that requires a proxy to access the internet, these should also be entered here.

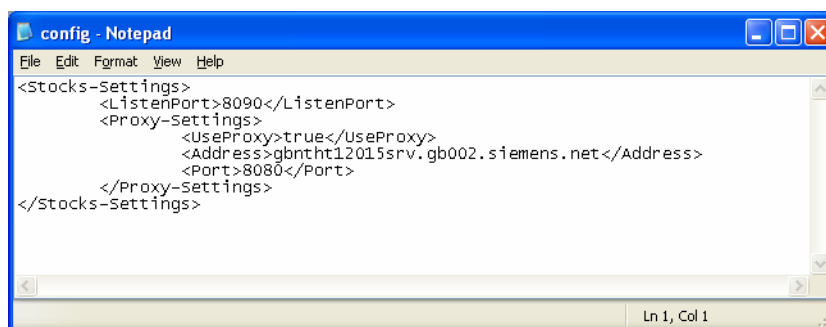


8. The Stocks & Shares server is now successfully installed

### 4.3 Configuring the Server

The configuration should be those set at installation. However if you need to edit the application's configuration, follow these steps.

1. Open up a text editor such as Notepad.
2. Then open the following file: \bin\config which is found in your installation directory.
3. The various settings of the server can be edited here.



4. Click File -> Save to save any changes.

### 4.4 Running the Server

1. To start the server, Click on the Start Button, and navigate to Stocks & Shares Server -> Stocks & Shares.
2. You will then see the server console screen, like the following:

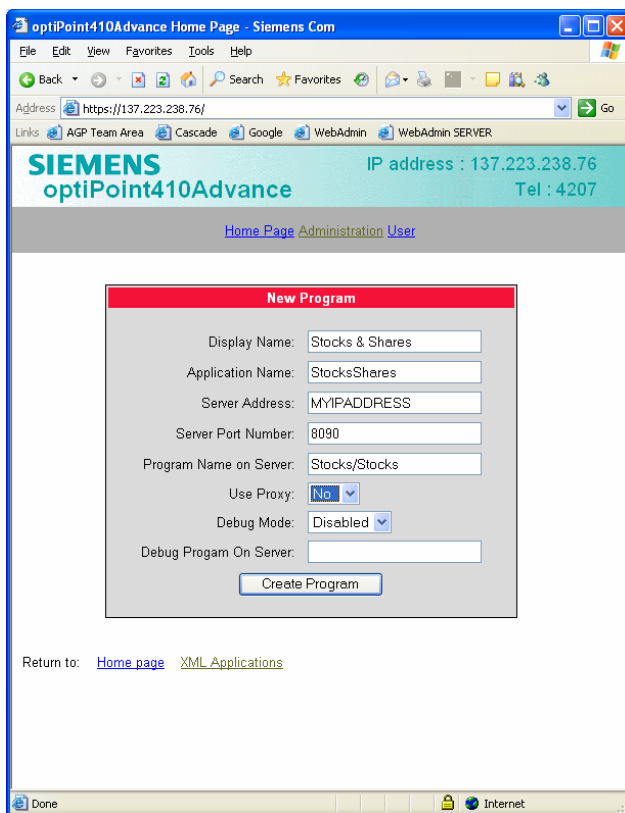


3. The Stocks & Shares application is now running.

## 4.5 Configuring the AGP to run Stocks & Shares

### 4.5.1 OptiPoint 410/420

The AGP allows to user to create multiple programs within the programs menu to different applications. This configuration utility is also available on the web portal. From the admin page see Applications, XML Applications and select new program. You should see the configuration utility as shown.



Enter the details as follows:

Display Name: Stocks & Shares

Application Name: StocksShares

Server Address: *{The IP Address of the server}*

Server Port Number: *{The port number of the stocks & shares server, default: 8090}*

Program Name on Server: Stocks/Stocks

Use Proxy: No

All other fields are optional.

Click Create Program. Stocks & Shares should now appear in the phone's Programs list. To use it, ensure the Stocks & Shares server is running (See **4.4 Running the Server**) and Press run when Stocks & Shares is selected in the Programs list on your OptiPoint phone.

#### **4.5.2 OpenStage 60/80**

Navigate to the Admin Menu by pressing the Applications Menu button. Enter the administrator password, then navigate to Applications → XML and select Add application.

Enter the following information in the fields:

Display name: StocksShares

Application name: StocksShares

Server address: *IP address of the server hosting the Stocks & Shares Application*

Server port: *Port number Stocks & Shares is listening on (Default 8090)*

Protocol: http

Program name: StocksShares/StocksShares

All other options are optional.

Save and exit the "New application" screen, navigate to the Applications tab by pressing the Applications Menu key until the tab is displayed. You should now see "StocksShares" as an option in the Applications list.

## 5. TROUBLESHOOTING

Q: Why do I receive an error when I start the application from the phone, saying that it cannot read from the server?

A: This is usually one of two things – either the configuration of the phone has not been set up correctly (See Section 4.5 Configuring the AGP to run) or the server application is not running (See Section 4.4 Running the Server).

Q: When I attempt to search for a company I keep getting errors, and My Portfolio just displays items that say “Loading...”

A: This maybe that you have not got the correct proxy settings configured and it cannot connect to the website that is providing the Stock Exchange information.

Q: I keep getting an alert every few minutes, what is wrong?

A: This might be because the alert criteria in question are always satisfied. When the criteria are satisfied you will be repeatedly alerted until you turn the alert off.

### 5.1 Stocks & Shares Checklist

Please check you have the following set up:

- The Stocks & Shares installation package has been successfully installed.
- “Stocks & Shares” has appeared in the “Programs” menu from the Start button.
- The server application has been started by clicking the “Stocks & Shares” file in the “Stocks & Shares Server” Programs menu.
- The machine running the server applications is connected to the internet, and the correct proxy settings are configured.
- The phone has been configured via it’s configuration pages to have all the correct server and program information for the Stocks & Shares application

You should now be able to use the Stocks & Shares AGP XML Application.

## 6. APPROVALS

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## 7. GLOSSARY

<b>AGP</b>	Application Generic Platform
<b>GenericMidlet</b>	AGP Midlet for use on the phone
<b>APM</b>	Applications Module
<b>Build</b>	The base software for the phone.
<b>XML</b>	Extensible Mark-up Language
<b>HTTP</b>	Hype Text Transfer Protocol
<b>JRE</b>	Java Runtime Environment

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