

## **Stocks & Shares – User Guide**

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<b>Author:</b>	<b>Stuart Coxhead</b> <a href="mailto:stuart.coxhead@siemens.com">stuart.coxhead@siemens.com</a>
<b>Department:</b>	<b>Siemens Enterprise Communications</b>
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## HISTORY OF CHANGE

<b>Version</b>	<b>Description</b>	<b>Date</b>
0.1	Initial Draft - Stuart Coxhead	13/02/2007
1b	Changed Versioning scheme Removed Installation instructions as they are in Stocks_&_Shares_Installation_Guide.doc Changed Introduction and Scope to be more relevant. Changed Usage headings to be more intuitive. Added System Overview section. Added Place holders for images, and tables outlining the use of all the commands. - Stuart Coxhead	22/02/2007
1c	Changed to suit version 1.2 Application now accesses UK, US and German Stock Exchanges.	24/04/2007

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## 1. INTRODUCTION

This document is the User Guide for the Stocks & Shares AGP XML application for the 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, US and German 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 & Hardware

- Access to an application server running the Stocks & Shares application.
- An OpenStage 60/80 phone configured to use the Stocks & Shares application.

Please see Stocks_&_Shares_Installation_Guide.doc for details on how to install the Stocks & Shares application and phone configuration.
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## 2. SCOPE

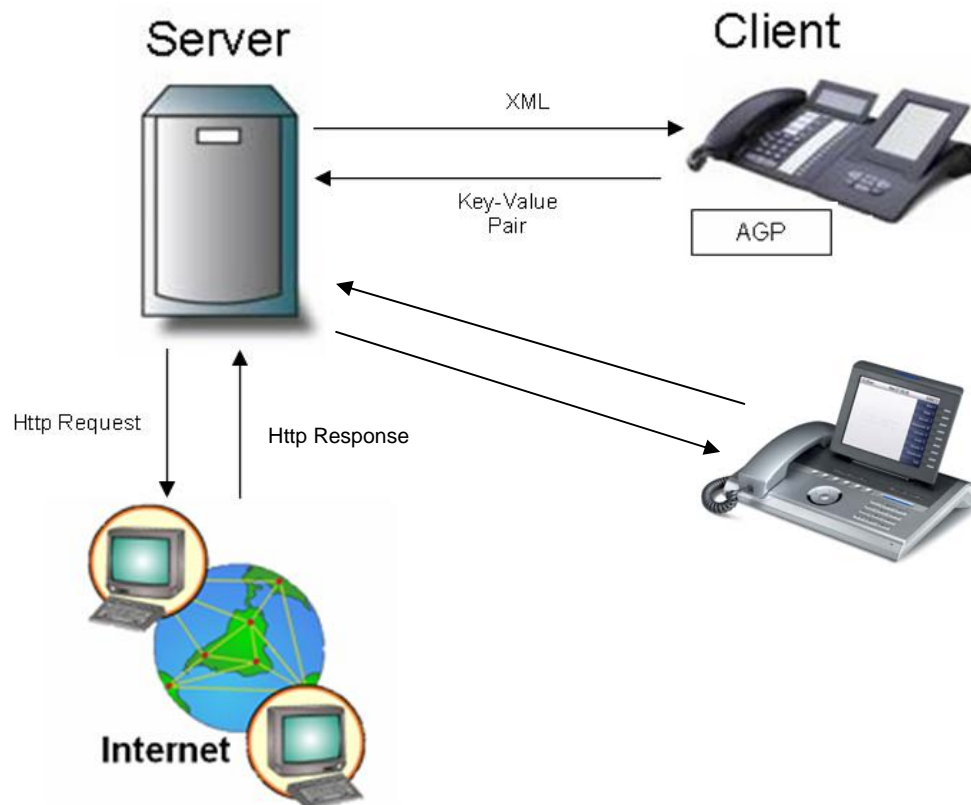
This document is intended for a user wishing to access Stocks & Shares Information on their OpenStage 60/80. It provides instructions for use and information on common problems.

It is assumed the user already has sufficient knowledge to operate an OpenStage phone.

It is also assumed the application is configured on the user's phone. If not, please contact the administrator or refer to the OpenStage documentation on how to configure an XML application.

Installation instructions of the Stocks & Shares application can be found in the following document; Stocks\_&\_Shares\_Installation\_Guide.doc.

### 3. SYSTEM OVERVIEW



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.

The Stocks & Shares application allows users to search and check prices of Stocks on UK, US and German Stock Exchanges.

Alerts can be set up to alert the user to Stocks and Shares reaching a certain price. The user can also save the companies that they have an interest in; in "My Portfolio" that allows the user check the price of all companies in their portfolio at-a-glance.

## 4. STOCKS & SHARES USAGE

### 4.1 Starting Stocks & Shares on the Phone

To start the Stocks & Shares application, navigate to the Application screen, by pressing the application mode key.



This may have to be pressed twice to navigate to the Applications Menu.

Select the “Stocks & Shares” application from the list of applications and press the “OK” button, located in the centre of the TouchGuide. The application will now launch.

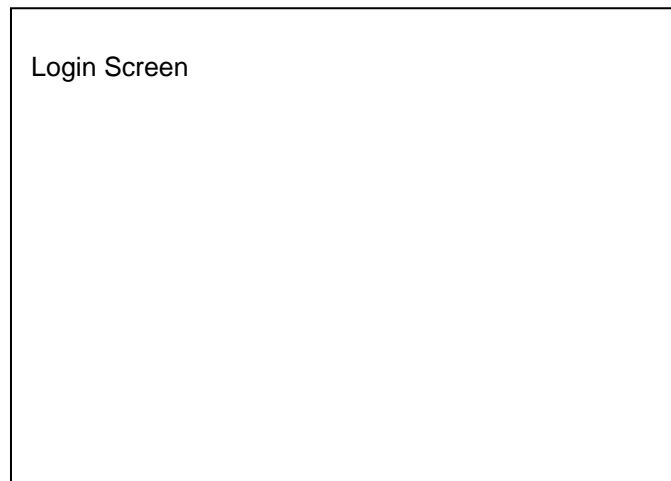
For more information about using the OpenStage phone please refer to the corresponding documentation.

### 4.2 Login

To use Stocks & Shares you must have an account.

To create a new account, press the “Create Account” button.

If you already have an account simply enter these details into the text fields provided and press the login button. If you tick the “Remember Me” option you will not be prompted to login the next time you start the application.



The following commands are available under the “Options” List.

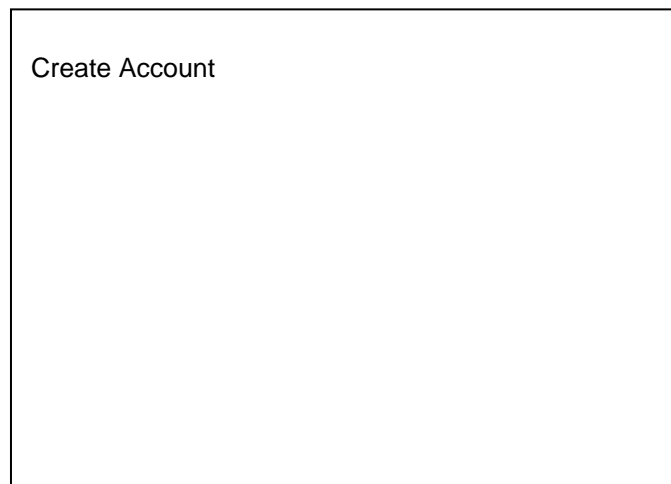
Command	Action
Login	Submits the user details and attempts to logon.
Create Account	Displays the page for creating new accounts.

The application will continue to Remember You until you select the “Logout” option on the main menu.

If you forget your account details, contact an Administrator and they can reset your password.

### 4.3 Create Account

To create a new account, simply enter your username and password in the fields provided, and then select the “Create” command. Your account should now be created and you can login to Stocks & Shares.



The following commands are available under the “Options” List.

Command	Action
Back	Returns to the Login Screen
Create	Submits the information and creates the account.

### 4.4 Main Menu

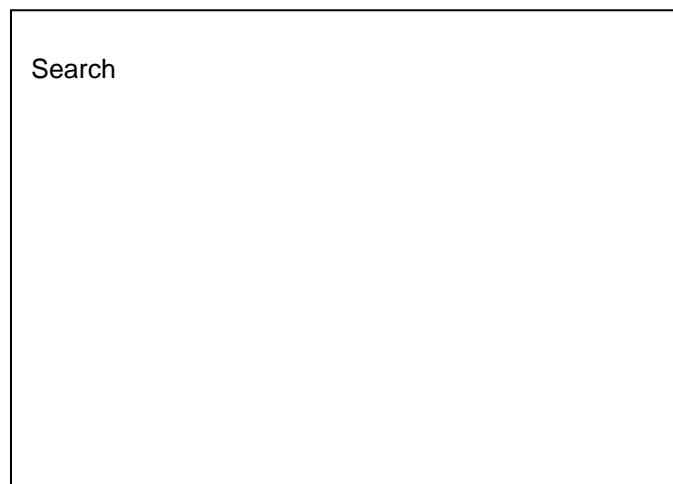
Here you have access to all the different features of Stocks & Shares. Simply select the feature from the list that you wish to carry out.

By pressing the Logout button you will exit the application and you will be forgotten, meaning the next time you start the application you will have to log in again.



#### 4.5 Search Stocks & Shares

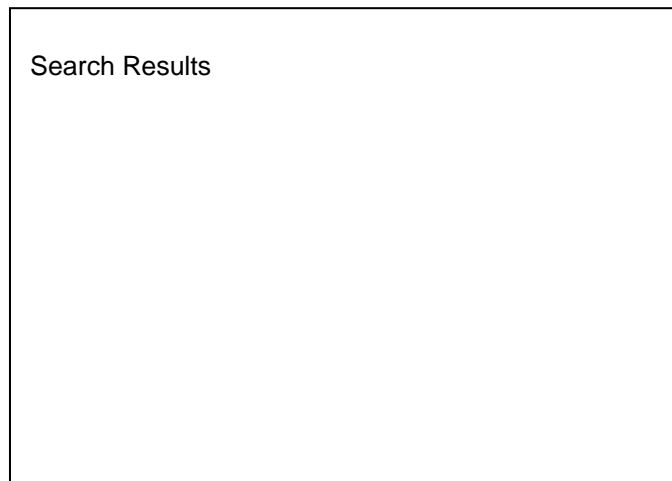
To search for a stock or an index simply type in the name or symbol of the company in the field provided, and select which exchange you wish to search, then press search.



The following commands are available under the "Options" List.

<b>Command</b>	<b>Action</b>
Back	Returns to the Main Menu
Search	Starts the search

The relevant results will then be displayed once the search is complete. To view further details about the particular stock, simply select the desired stock from the results list.



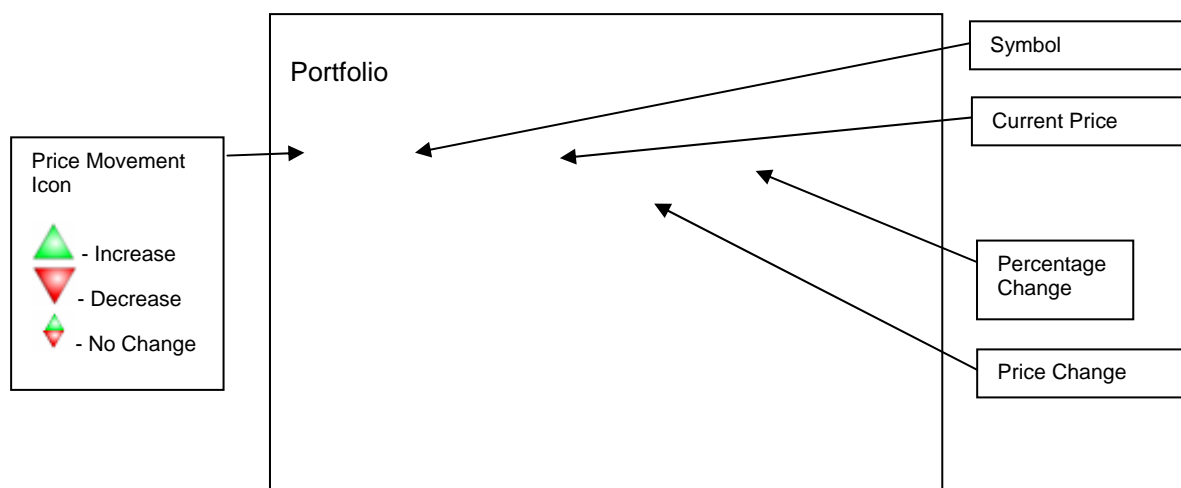
The following commands are available under the “Options” List.

Command	Action
Back	Returns to the Search Screen
Main Menu	Returns to the Main Menu

## 4.6 My Portfolio

Selecting “My Portfolio” from the Main Menu displays all of the stocks or indices that you have saved. It displays the symbol of the stock and its current price and change. The portfolio can provide quick at glance info about all of your stocks.

To view further details of the stock, simply select the desired stock.



Note: If NA is displayed, this means the data is Not Available. This usually means the particular exchange is closed for trading.

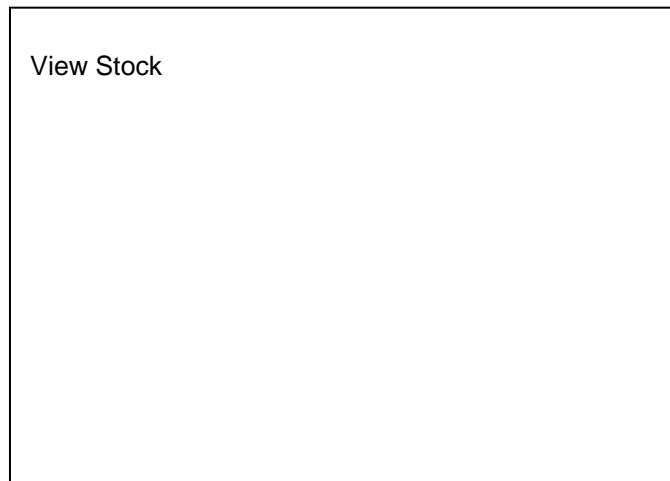
The following commands are available under the “Options” List.

<b>Command</b>	<b>Action</b>
Back	Returns to the Main Menu

## 4.7 Viewing a Stock

When viewing a particular stock, the following details are displayed; Current Price, Daily Change, Update Time, Day High/Low and Year High/Low.

By selecting the “Options” command further options are available to you.

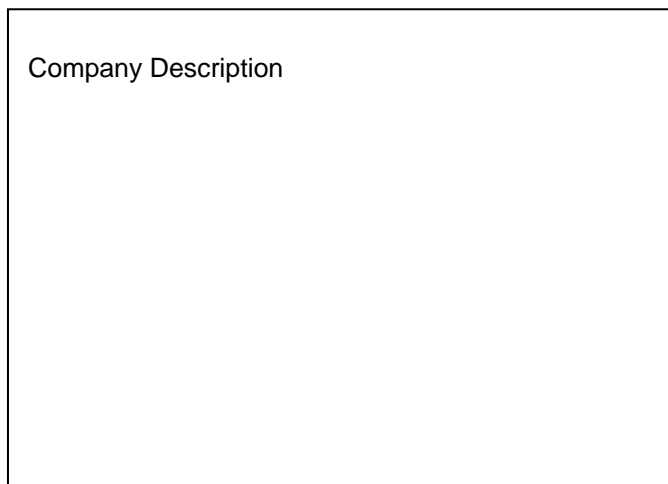


The following commands are available under the “Options” List.

<b>Command</b>	<b>Action</b>
View Description	Views the description of the company
View Charts	Allows you to view charts on the company's performance.
Add to Portfolio Or Remove fro Portfolio	Adds or removes the stocks from the portfolio, depending on if it is already present.
Create Alert Or Edit Alert	Allows you to create of edit an alert for this stock depending upon if one already exists.
Back	Returns to the previous screen
Main Menu	Returns to the Main Menu

### 4.7.1 Viewing Company Description

By selecting "View Description" from a Stock's option list, you can view a brief description of the company. You can return to the options menu by pressing the "Back" button.



The following commands are available under the "Options" List.

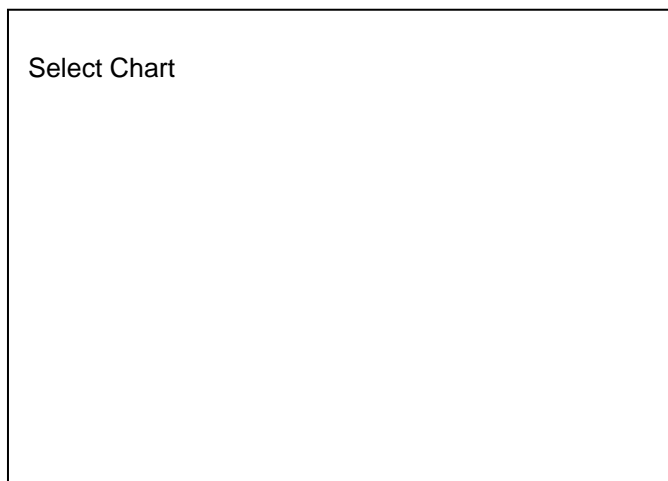
Command	Action
Main Menu	Returns to the main menu
Back	Returns to the View Stock page

### 4.7.2 Viewing Company Charts

To view a chart plotting the stock's price over a period of time, simply select the "View Charts" from the stock's options menu.

Here you can select a period of time you wish to see the stock for. You have the choice of; 1 day, 5 days, 1 Month, 6 Months, and 1 Year.

By pressing the "Back" button, you can return to the stock's option menu.



The following commands are available under the “Options” List.

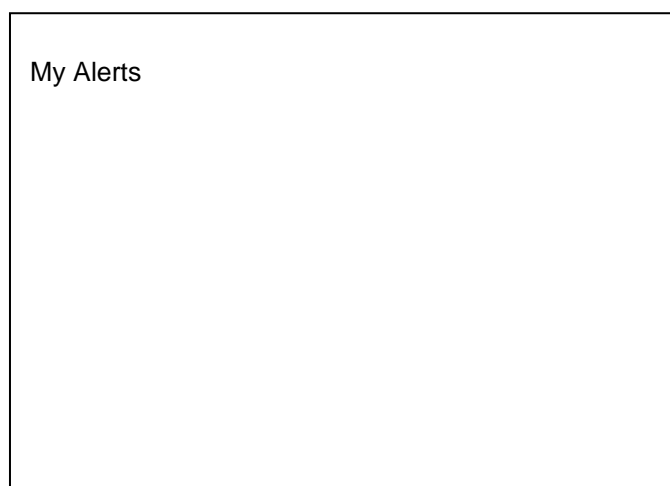
<b>Command</b>	<b>Action</b>
Main Menu	Returns to the main menu
Back	Returns to the View Stock page

### **4.7.3 Adding/Removing Stock from Portfolio**

From the stock’s options menu, you can add it to your portfolio if it isn’t already, or remove it, if it is already in your portfolio.

### **4.8 Alerts**

The My Alerts screen allows you to configure your alerts. Select an option from the menu, or select the “Back” command to return to the Main Menu.

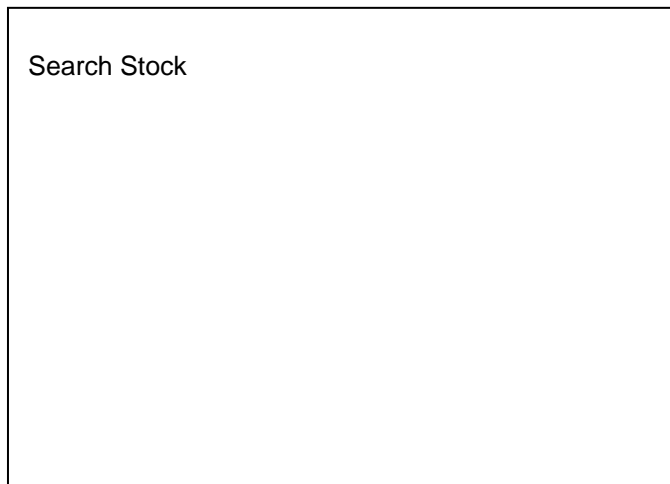


The following commands are available under the “Options” List.

<b>Command</b>	<b>Action</b>
Back	Returns to the Main Menu

### 4.8.1 Create a New Alert

To create a new alert you can select the “Create Alert” option from the stock’s options page, or you can search for a stock to create an alert for by selecting the “Create New Alert” option from the “My Alerts” page.



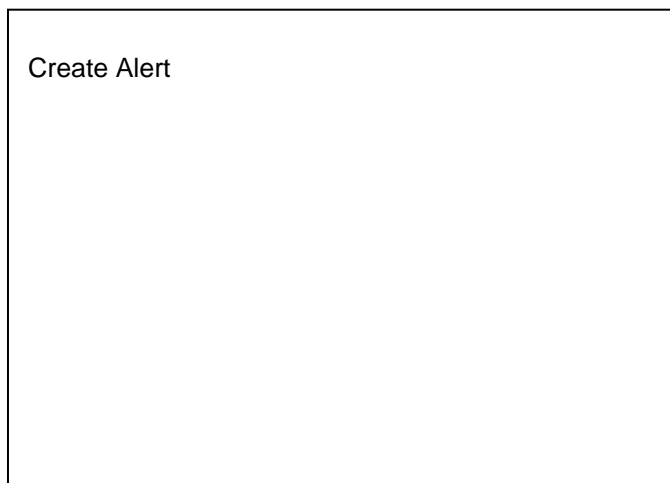
The following commands are available under the “Options” List.

Command	Action
Search	Starts the search
Main Menu	Returns to the main menu
Back	Returns to the My Alerts page

If you have not already selected a Stock or Share to create an alert for you will have to search for the stock and select it from the list provided (Using the screen above).

You can automatically select a stock by selecting the “Create Alert” option from the stock’s option menu on the “View Stock” page.

Once you have selected the stock to create an alert for, you will be shown the Edit Alert screen. Here you can add different criteria on which you will send an alert for if the price matches your alert criteria.



The following commands are available under the “Options” List.

<b>Command</b>	<b>Action</b>
Add Criteria	Allows you to add new criteria to the page
Save	Saves the alert.
Main Menu	Returns to the main menu
Back	Returns to the Create Alert page

To add alert criteria select the “Add Criteria” command.

You then select the type of alert criteria you are adding, and then enter the value in the field provided. Press the “Add” button to attach the criteria to the Alert.

Add Criteria

The following commands are available under the “Options” List.

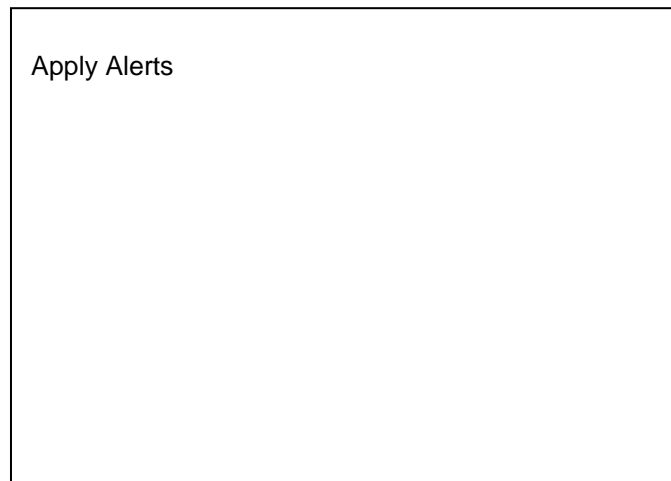
<b>Command</b>	<b>Action</b>
Search	Adds the criteria to the alert.
Main Menu	Returns to the main menu
Back	Returns to the Create Alert page

To remove a piece of criteria navigate to the piece of criteria on the “Create Alert” page and select it by pressing “OK”, this will then bring up a command list which will contain the “Delete Button”, select this to delete the selected piece of criteria.

Once you have added all of the criteria, you must press the “Save” button. Pressing the “Back” button will lose any changes you have made to the alert.

#### **4.8.2 Apply Alerts**

You can quickly turn an alert on or off by selecting the “Apply Alerts” option from the My Alerts page. Here the alerts that are turned on should be selected. To save the applied alerts, press the “Apply” button. To discard any changes you have made and return to the menu, press the “Back” button.



The following commands are available under the "Options" List.

<b>Command</b>	<b>Action</b>
Apply	Saves the list of applied filters
Back	Returns to the My Alerts Menu
Main Menu	Returns to the Main Menu

### **4.8.3 Edit Alert**

To edit an alert either select the desired alert from the "Edit Alerts" page, got to from the "My Alerts" menu, or if you already have an alert on a particular stock, you can select "Edit Alert" from the stock's options menu.

You will then be presented with the edit alert screen. Please read 4.8.1

Create a New Alert for instructions on adding criteria to an alert.

The following commands are available under the "Options" List.

<b>Command</b>	<b>Action</b>
Edit	Takes you to the page where you can edit the alert.
Back	Returns to the previous page.
Main Menu	Returns to the Main Menu

#### 4.8.4 Delete Alert

To delete an alert, you must select the "Delete Alerts" option from the "My Alerts" menu. Then simply select the alerts you wish to delete and then press the "Delete" button to permanently remove the alert.

The following commands are available under the "Options" List.

<b>Command</b>	<b>Action</b>
Delete	This will delete the selected alerts.
Back	Returns to the My Alerts Menu
Main Menu	Returns to the Main Menu

### 4.9 Settings

#### 4.9.1 Change Password

To change your password, simply select the "Settings" option from the "Main Menu". Here you must enter your old password, and your new password, and then press the "Change" button.

Change Pass

The following commands are available under the "Options" List.

<b>Command</b>	<b>Action</b>
Change	Changes the user password
Main Menu	Returns to the main menu

## 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 or the server application is not running. In this case please contact your application administrator.

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.

Q: Why do some data fields have “NA” in them?

A: This means the particular data is currently not available; this usually means the particular exchange is closed for trading.

## 6. APPROVALS

<b>Approval Authority</b>	<b>Arshad Kureshi</b> <a href="mailto:Arshad.kureshi@siemens.com">Arshad.kureshi@siemens.com</a>
<b>Author</b>	<b>Stuart Coxhead</b> <a href="mailto:Stuart.Coxhead@siemens.com">Stuart.Coxhead@siemens.com</a>

## 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

- End of document -