



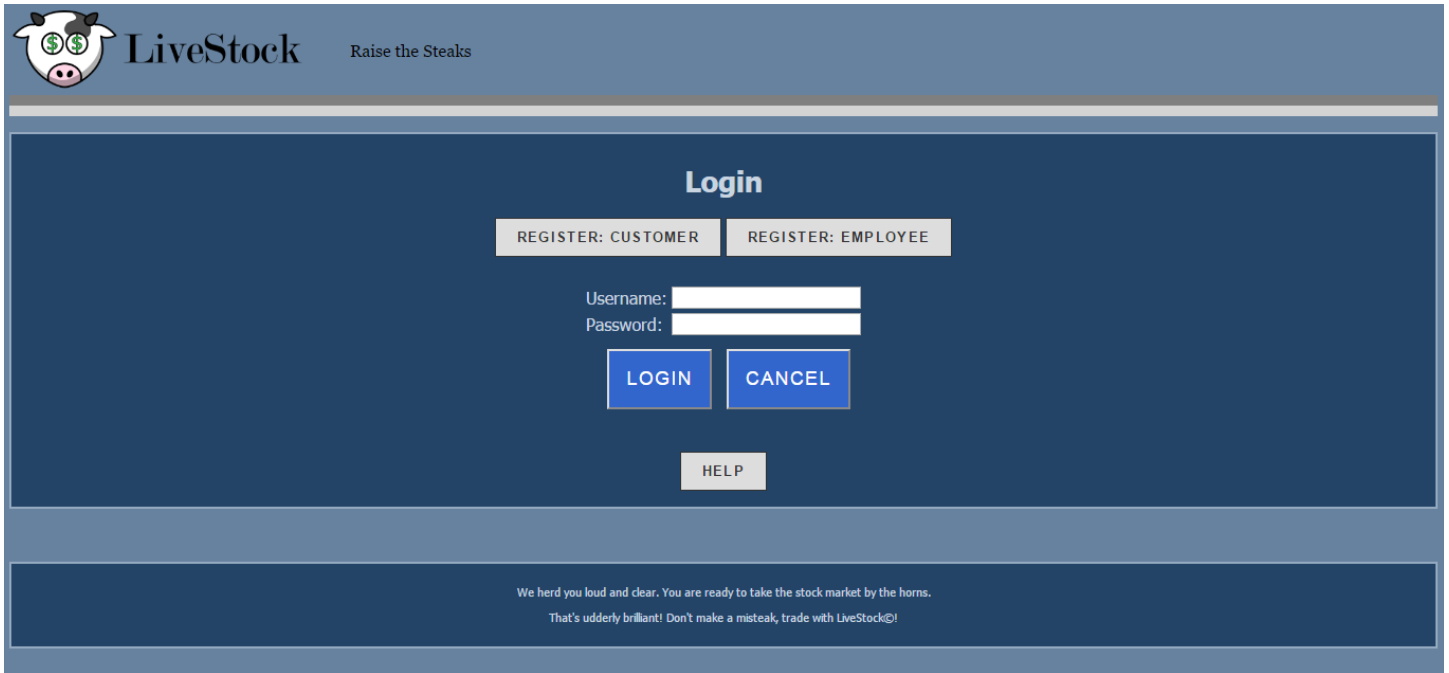
LIVESTOCK

CSE 305: User Guide



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Login



The image shows a web application interface for 'LiveStock'. At the top left is a logo of a cow's head with dollar signs for eyes, followed by the text 'LiveStock' and the tagline 'Raise the Steaks'. The main content area is a dark blue rectangle with the title 'Login' in white. Below the title are two buttons: 'REGISTER: CUSTOMER' and 'REGISTER: EMPLOYEE'. Under these are two input fields labeled 'Username:' and 'Password:'. Below the input fields are two blue buttons: 'LOGIN' and 'CANCEL'. At the bottom of the main area is a 'HELP' button. A footer section at the very bottom contains the text: 'We herd you loud and clear. You are ready to take the stock market by the horns. That's udderly brilliant! Don't make a mistake, trade with LiveStock©!'.

Object	Function
Register Customer	Register as a customer
Register Employee	Register as an employee
Username	Where you put your username (case sensitive)
Password	Where you put your password (case sensitive)
Login	Click this button to login once you have input your username and password
Cancel	Click this button to clear out the login and password fields
Help	Click this button to bring you to the main help page describing the transactions that different user classes can perform

Register Customer

Customer - Register

Username:

Password:

First Name:

Last Name:

Address:

City:

State:

ZipCode:

Telephone:

Email:

Object	Function
Username	Your username (case sensitive)
Password	Your password (case sensitive)
First Name	Your first name
Last Name	Your last name
Address	Your address
City	Your city
State	Your state
Zip Code	Your zip code
Telephone	Your telephone number with no dashes
Email	Your email
Register	Register for a new account once you have filled in all the information
Cancel	Go back to the login page

Register Employee

Employee - Register

Username:

Password:

First Name:

Last Name:

SSN:

Address:

City:

State:

ZipCode:

Telephone:

Start Date:

yyyy-mm-dd

Hourly Rate:

Position:

☐ Manager
 ☐ Customer Rep

REGISTER

CANCEL

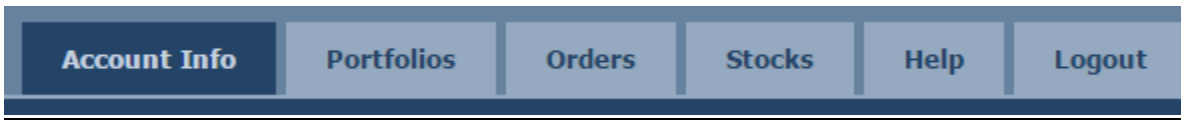
Object	Function
Username	Your username
Password	Your password
First Name	Your first name
Last Name	Your last name
SSN	Your Social Security Number
Address	Your address
City	Your city
State	Your state
Zip Code	Your zip code
Telephone	Your telephone number with no dashes
Start Date	Your start date (Format yyyy-mm-dd)
Hourly Rate	Your hourly rate
Register	Register for a new account once you have filled in all the information
Cancel	Go back to the login page

Help



Object	Function
Help	Click to reveal drop down menu
Login	Return to the login page
Manager	Go to the help section for Manager
Customer Representative	Go to the help section for Customer Representative
Customer	Go to the help section for Customer

Customer



Object	Function
Account Info	View your account information
Portfolios	View information about the stocks that you currently own
Orders	View your pending and completed orders
Stocks	Search for stocks and place orders
Help	View the help manual for customers
Logout	Logout of your account

Account Info

Account Information	
Username	Clark
First Name	Lewis
Last Name	Philip
Address	135 Knowledge Lane
City	Stony Brook
State	NY
ZipCode	11794
Telephone	5166668888
Email	pml@cs.sunysb.edu

Portfolios

Accounts

Account Number	Account Creation Date	Credit Card Number
1	2006-10-01	1234567812345678

Stock Symbol	Number of Shares	Stop	Stop Price
F	70	None	0.0

Stock Symbol	Number of Shares	Stop	Stop Price
GM	250	None	0.0

Account Number	Account Creation Date	Credit Card Number
3	2016-04-28	1231231312312312

Stock Symbol	Number of Shares	Stop	Stop Price
F	100	None	0.0

Stock Symbol	Number of Shares	Stop	Stop Price
GM	250	None	0.0

Account Number	Account Creation Date	Credit Card Number
4	2016-04-28	2131443123123141

Orders

Orders

Time	Order Type	Account	Stock	NumShares	Price Type	Stop Price	Recorded	Completed	Get Conditional Price History?
2016-04-27 18:42:22.0	Sell	1	F	30	Market	\$0.0	Yes	Yes	
2016-04-28 10:12:50.0	Sell	1	IBM	22	Market	\$0.0	Yes	Yes	

GET HISTORY

Object	Function
Get History	Get the Conditional Price History of your Orders

Stocks

Current Stock Listings

Stock Symbol	Stock Name	Stock Type	Share Price	Number of Available Shares	Place Order
F	Ford	automotive	9.0	780	<input type="radio"/>
GM	General Motors	automotive	34.23	1000	<input type="radio"/>
IBM	IBM	computer	91.43	500	<input type="radio"/>

ORDER STOCK

CURRENT STOCK LISTINGS

BEST SELLERS

SUGGESTED FOR YOU

Search on type: SEARCH TYPE

Search on keyword. Separate multiple terms with a comma: SEARCH KEYWORD

Get Price History for a Stock over a Range of Dates:

Stock Symbol:

Start Date:

End Date:

GET HISTORY

Object	Function
Order Stock	Order a particular stock by marking the appropriate radio button
Current Stock Listings	View the current stock listings
Best Sellers	View the best selling stocks
Suggested For You	View the stocks that are suggested for you
Search Type	Search for a specific stock type
Search Keyword	Search for specific stocks using keywords
Get History	Get the price of a given Stock over a Start Date and End Date

Help

Help

Hello! You are currently logged in as a customer. If this is incorrect, please logout using the button on the top right. Otherwise, here is what you can do on this account:

Account Info
View and update your account information.

Portfolio
View information about the stocks that you currently own.

Orders
View your pending and completed orders.

Stocks
Search for stocks and place orders.

Conditional Price History
View Conditional Price History for conditional orders.

Help
Read this help page.

Logout
Logout of this account and end the session.

Customer Representative

Account Info	Utilities	Customers	Colleagues	Orders	Stocks	Help	Logout
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Object	Function
Account Info	View your account information
Utilities	Generate Mailing lists and stock suggestions for a given customer
Customers	View, Add, Edit, and Delete Customers
Orders	View and record Orders
Stocks	Search for stocks
Help	View the help manual for customers representatives
Logout	Log out of your account

Account Info

Account Information	
Username	54321
First Name	54321
Last Name	54321
Address	54321
City	54321
State	54321
ZipCode	54321
Telephone	54321
Position	CusRep
Start Date	1111-11-11 00:00:00.0
Hourly Rate	43

Utilities

<p>Mailing List</p> <p>GENERATE</p> <p>Customer Stock Suggestions</p> <p>SELECT A CUSTOMER</p>
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Object	Function
Generate	Generate the customer mailing list
Select a Customer	Select a customer to preview their stock suggestions

Customers

The image shows three overlapping web forms for customer management. The 'Add' form is on the left, the 'Edit' form is in the middle, and the 'Delete' form is on the right. Each form has a title bar, input fields, and a 'CONFIRM' button.

Add Form:

- Username:
- Password:
- First name:
- Last name:
- Address:
- City:
- State:
- Zip Code:
- Telephone:
- Email:
- Rating:
- CONFIRM**

Edit Form:

- ID:
- Field:
- New:
- CONFIRM**

Delete Form:

- Customer ID:
- CONFIRM**

Object	Function
Add	Form where you can add a customer
Edit	Form where you can edit a specific field for a customer
Delete	Form where you can delete a customer

Colleagues

Colleagues								
Employee Id	First	Last	Address	City	State	Zip Code	Telephone	Start Date
5	1231a	123123	231	231	1231	121	12321	1231-11-11 00:00:00.0
6	54321	54321	54321	54321	54321	54321	1231321	1111-11-11 00:00:00.0
7	abcd	abcd	abcd	abcd	abcd	11111	111	1111-11-11 00:00:00.0
9	abcd	abcd	abcd	abcd	abcd	111	11	1111-11-11 00:00:00.0
10	test	test	test	test	test	11111	11111	1111-11-11 00:00:00.0
11	12345	12345	12345	12345	12345	12345	12345	1111-11-11 00:00:00.0
14	David	Warren	456 Sunken Street	Stony Brook	NY	11794	6316329987	2006-02-02 00:00:00.0

Orders

Orders									
Time	Order Type	Account	Stock	NumShares	Price Type	Stop Price	Recorded	Completed	Record?
2016-04-27 18:42:22.0	Sell	1	F	30	Market	\$0.0	Yes	Yes	
2016-04-28 10:12:50.0	Sell	1	IBM	22	Market	\$0.0	Yes	Yes	
2016-04-29 23:00:00.0	Sell	2	IBM	1231	Market	\$0.0	No	No	<input type="checkbox"/>

RECORD

Object	Function
Record	Record an order that has not yet been recorded

Stocks

Current Stock Listings				
Stock Symbol	Stock Name	Stock Type	Share Price	Number of Available Shares
F	Ford	automotive	9.0	780
GM	General Motors	automotive	34.23	1000
IBM	IBM	computer	91.43	500

CURRENT STOCK LISTINGS BEST SELLERS

Search on type: SEARCH TYPE

Search on keyword. Separate multiple terms with a comma: SEARCH KEYWORD

Object	Function
Current Stock Listings	View the current stock listings
Best Sellers	View the best selling stocks
Suggested For You	View the stocks that are suggested for you
Search Type	Search for a specific stock type
Search Keyword	Search for specific stocks using keywords

Help

Help

Hello! You are currently logged in as a Customer Representative. If this is incorrect, please logout using the button on the top right. Otherwise, here is what you can do on this account:

Account Info

View and update your account information.

Utilities

Manage customer accounts and associated tools.

Customers

Manage customer account information.

Colleagues

View Employee Directory.

Orders

View and record pending orders, or view completed orders.

Stocks

Search for stocks and place orders.

Help

Read this help page.

Logout

Logout of this account and end the session.

Manager

Account Info

Employees

Users

Finances

Orders

Stocks

Utilities

Help

Logout

Object	Function
Account Info	View your account information
Employees	View, Add, Edit, and Delete Employees
Users	View, Add, and Delete Employees and Customers
Finances	View the Revenue related information
Orders	View and record Orders
Stocks	Search for stocks and set stock prices
Utilities	Backup and Restore the database
Help	View the help manual for managers
Logout	Log out of your account

Account Info

Account Information

Username

12345

First Name

12345

Last Name

12345

Address

12345

City

12345

State

12345

ZipCode

12345

Telephone

12345

Position

Manager

Start Date

1111-11-11 00:00:00.0

Hourly Rate

11

Employees

Employees									
Employee Id	First	Last	Address	City	State	Zip Code	Telephone	Start Date	Hourly Rate
5	1231a	123123	231	231	1231	121	12321	1231-11-11 00:00:00.0	12
6	54321	54321	54321	54321	54321	54321	1231321	1111-11-11 00:00:00.0	11
7	abcd	abcd	abcd	abcd	abcd	11111	111	1111-11-11 00:00:00.0	11
9	abcd	abcd	abcd	abcd	abcd	111	11	1111-11-11 00:00:00.0	11
10	test	test	test	test	test	11111	11111	1111-11-11 00:00:00.0	12
13	54321	54321	54321	54321	54321	54321	54321	1111-11-11 00:00:00.0	43
14	David	Warren	456 Sunken Street	Stony Brook	NY	11794	6316329987	2006-02-02 00:00:00.0	50

Add

Username:

Password:

First name:

Last name:

Address:

City:

State:

Zip Code:

Telephone:

Start Date:

yyyy-mm-dd

Hourly Rate:

SSN:

CONFIRM

Edit

ID:

5

Field:

First Name

New:

CONFIRM

Delete

Employee ID:

5

CONFIRM

Object	Function
Add	Form where you can add an employee
Edit	Form where you can edit a specific field for an employee
Delete	Form where you can delete an employee

Users

Employees									
Employee Id	First	Last	Address	City	State	Zip Code	Telephone	Start Date	Hourly Rate
5	1231a	123123	231	231	1231	121	12321	1231-11-11 00:00:00.0	12
6	54321	54321	54321	54321	54321	54321	1231321	1111-11-11 00:00:00.0	11
7	abcd	abcd	abcd	abcd	abcd	11111	111	1111-11-11 00:00:00.0	11
9	abcd	abcd	abcd	abcd	abcd	111	11	1111-11-11 00:00:00.0	11
10	test	test	test	test	test	11111	11111	1111-11-11 00:00:00.0	12
13	54321	54321	54321	54321	54321	54321	54321	1111-11-11 00:00:00.0	43
14	David	Warren	456 Sunken Street	Stony Brook	NY	11794	6316329987	2006-02-02 00:00:00.0	50

Customers									
Customer Id	First	Last	Address	City	State	Zip Code	Telephone	Email	Rating
2	Victor	Du	456 Fortune Road	Stony Brook	NY	11790	5166324360	vicdu@cs.sunysb.edu	1
3	John	Smith	789 Peace Blvd.	Los Angeles	CA	93536	3154434321	jsmith@ic.sunysb.edu	1
4	Lewis	Philip	135 Knowledge Lane	Stony Brook	NY	11794	5166668888	pml@cs.sunysb.edu	1
6	0987	0987	0987	0987	0987	0987	0987	0987	1
7	09876	09876	09876	09876	09876	09876	09876	09876	1

ADD EMPLOYEE

Username:

Password:

First name:

Last name:

Address:

City:

State:

Zip Code:

Telephone:

Start Date:

Hourly Rate:

SSN:

CONFIRM

ADD CUSTOMER

Username:

Password:

First name:

Last name:

Address:

City:

State:

Zip Code:

Telephone:

Email:

Rating:

CONFIRM

DELETE EMPLOYEE

Employee ID:

CONFIRM

DELETE CUSTOMER

Customer ID:

CONFIRM

Object	Function
Add Employee	Form where you can add an employee
Add Customer	Form where you can add a customer
Delete Employee	Form where you can delete an employee
Delete Customer	Form where you can delete a customer

Finances

Transactions				
Transaction Id	Order Id	Fee	Time	Price Per Share
1	1	13.5	2016-04-29	9.0

SALES REPORT

Month:

Year:

EMPLOYEE AND CUSTOMER OF THE YEAR

SUMMARY OF REVENUE BY STOCK TYPE

Stock Type:

SUMMARY OF REVENUE BY STOCK

Stock Symbol:

SUMMARY OF REVENUE BY CUSTOMER

Customer:

Object	Function
Sales Report	Get the sales report for a particular month and year
Employee and Customer of the Year	Get the employee and customer who generated the most revenue this year
Summary of Revenue by Stock Type	Get the revenue generated by a certain stock type
Summary of Revenue by Stock	Get the revenue generated by a particular stock
Summary of Revenue by Customer	Get the revenue generated by a specific customer

Orders

Orders									
Order Id	Customer Account #	Employee Id	Stock Symbol	Order Type	Num Shares	Price Type	Share Price	Time	Recorded
1	1	0	F	Sell	30	Market	0.0	2016-04-27 18:42:22.0	true
2	1	0	IBM	Sell	22	Market	0.0	2016-04-28 10:12:50.0	true
3	2	0	IBM	Sell	1231	Market	0.0	2016-04-29 23:00:00.0	false

CUSTOMER NAME FILTER	STOCK SYMBOL FILTER
Customer Name: <input type="text" value="Victor Du"/>	Stock Name: <input type="text" value="F"/>
<input type="button" value="GO"/>	<input type="button" value="GO"/>

Object	Function
Customer Name Filter	Filter the Orders by Customer Name
Stock Symbol Filter	Filter the Orders by Stock Symbol

Stocks

Current Stock Listings						
Stock Symbol	Stock Name	Stock Type	Share Price	Number of Available Shares	Number of Orders	Set Price
F	Ford	automotive	9.0	780	1	<input type="text"/>
IBM	IBM	computer	91.43	500	2	<input type="text"/>

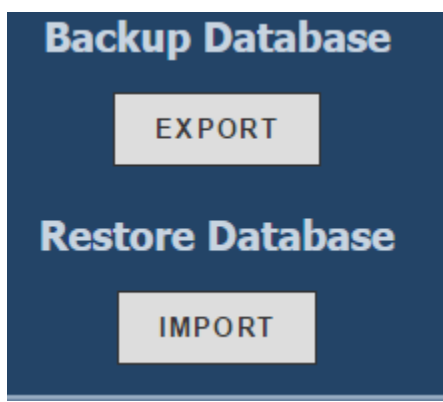
Number to show:

Search on type:

Search on keyword. Separate multiple terms with a comma:

Object	Function
Set Price	Set the price for a particular stock
Current Stock Listings	View the current stock listings
Best Sellers	View the best selling stocks
Most Actively Traded	View a certain number of most actively traded stocks
Search Type	Search for a specific stock type
Search Keyword	Search for specific stocks using keywords

Utilities



Object	Function
Export	Export the database into the dump.sql file
Import	Import the database stored in the dump.sql file

Help

Help

Hello! You are currently logged in as a Manager. If this is incorrect, please logout using the button on the top right. Otherwise, here is what you can do on this account:

Account Info
View and update your account information.

Stocks
Search for stocks and place orders.

Employees
View and manage your employees.

Users
View and manage the users of LiveStock.

Finances
View and manage your employees.

Orders
View and sort orders based on stock symbols or by customer name.

Back Up
Back up the database.

Help
Read the help page of the Manager.

Logout
Logout of this account and end the session.