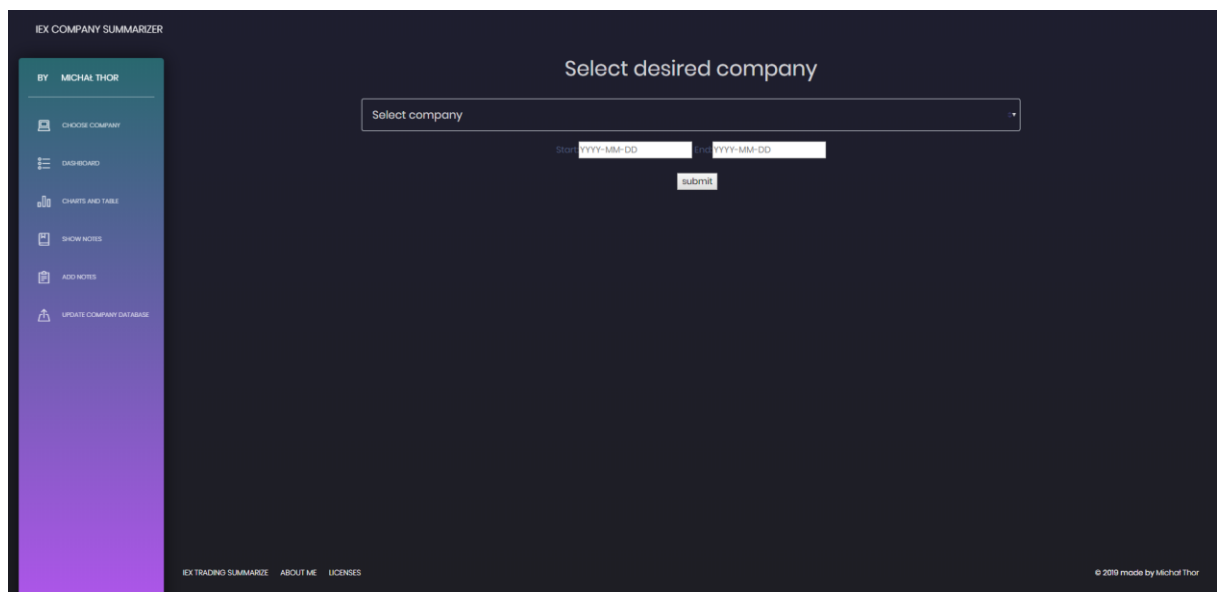


IEX COMPANY SUMMARIZER v1.0 – DOCUMENTATION

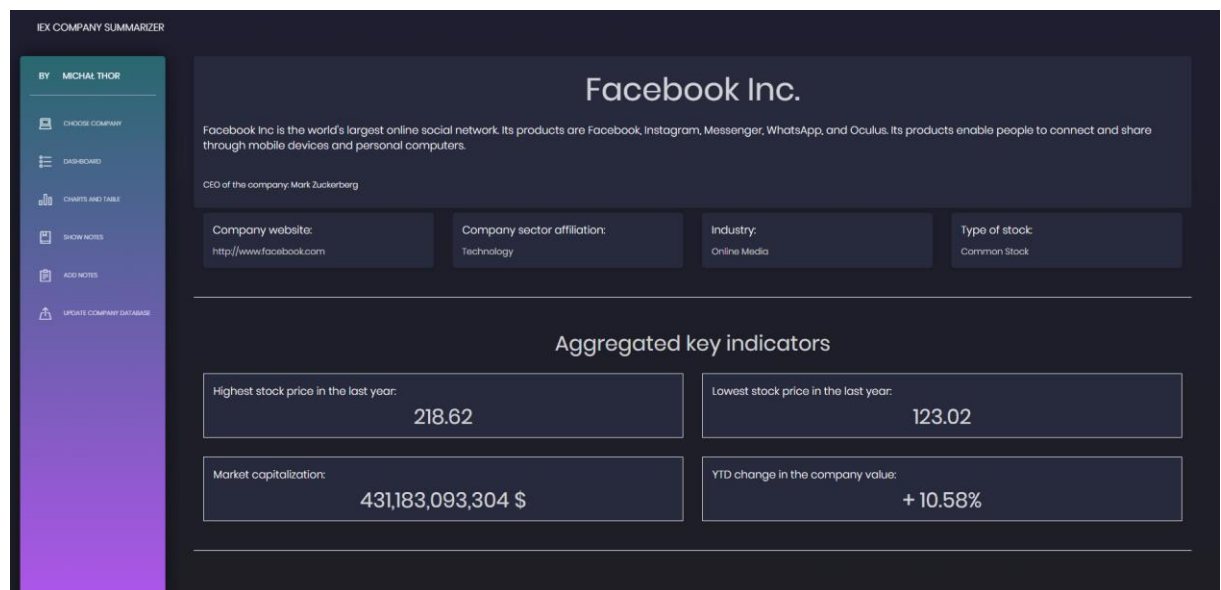
1. Open folder “python_intro_project”.
 - 1.1. Open console (cmd.exe or bash), set the path in to the folder and download all needed libraries by typing “*pip install -r requirements.txt*”
2. Run .py file named “IEX_Company_Sum” (type “*python IEX_Company_Sum*” in console).
3. In your browser (**DO NOT USE IE/Edge ver. 9 and lower**) open: <http://localhost:8081/>.
4. [CHOOSE COMPANY] You should see that screen (**Starting Screen**):



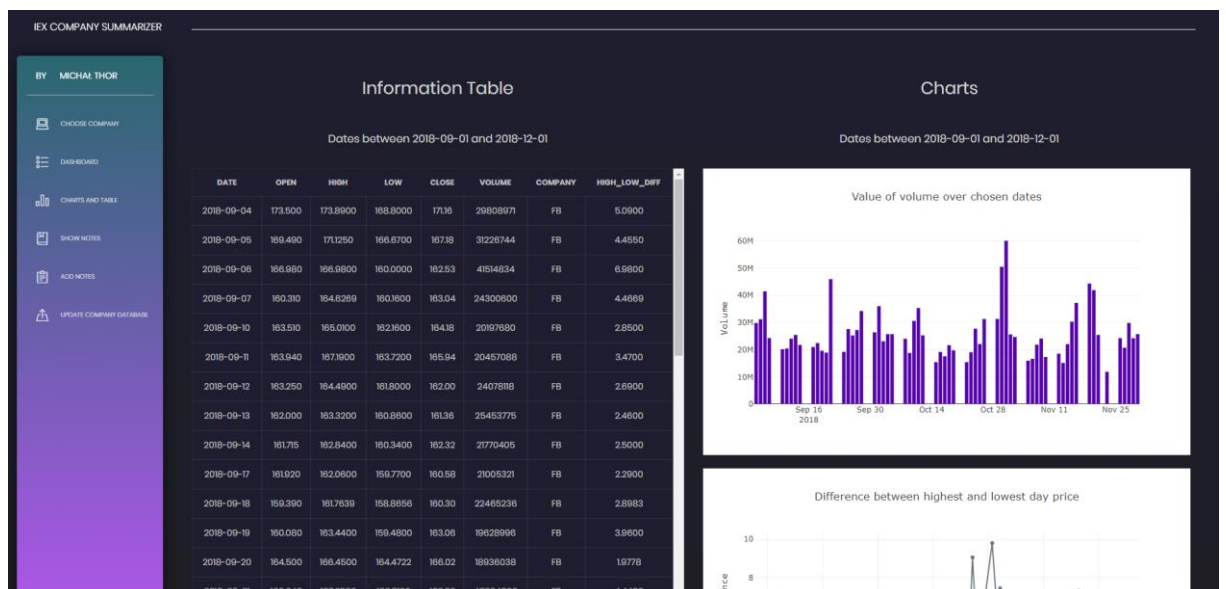
The screenshot shows the 'IEX COMPANY SUMMARIZER' web application. On the left is a navigation bar with a teal-to-purple gradient, containing the text 'BY MICHAŁ THOR' and several menu items: 'CHOOSE COMPANY', 'DASHBOARD', 'CHARTS AND TABLE', 'SHOW NOTES', 'ADD NOTES', and 'UPDATE COMPANY DATABASE'. The main area has a dark background with the title 'Select desired company'. Below this is a large dropdown menu labeled 'Select company'. Under the dropdown are two date input fields: 'Start: YYYY-MM-DD' and 'End: YYYY-MM-DD', followed by a 'submit' button. At the bottom of the page, there are links for 'IEX TRADING SUMMARIZER', 'ABOUT ME', and 'LICENSES', and a copyright notice '© 2019 made by Michał Thor'.

- 4.1. From the dropdown form you can choose any company listed on IEX Stock Exchange
 - 4.1.1. Type date (in YYYY-MM-DD format) from which you desire to see the results in the window next to “Start:”. **It has to be less than 5 years apart from now.**
 - 4.1.2. Type date (in YYYY-MM-DD format) till which you desire to see the results in the window next to “End:” **It has to be less than 5 years apart from now and after the date from 5.1.2.**
 - 4.1.3. Click “Submit” button that will transfer you to **Dashboard** (all 3 forms have to be properly entered to gain access to dashboard).
- 4.2. You can also choose different content from the **Navigation Bar**.

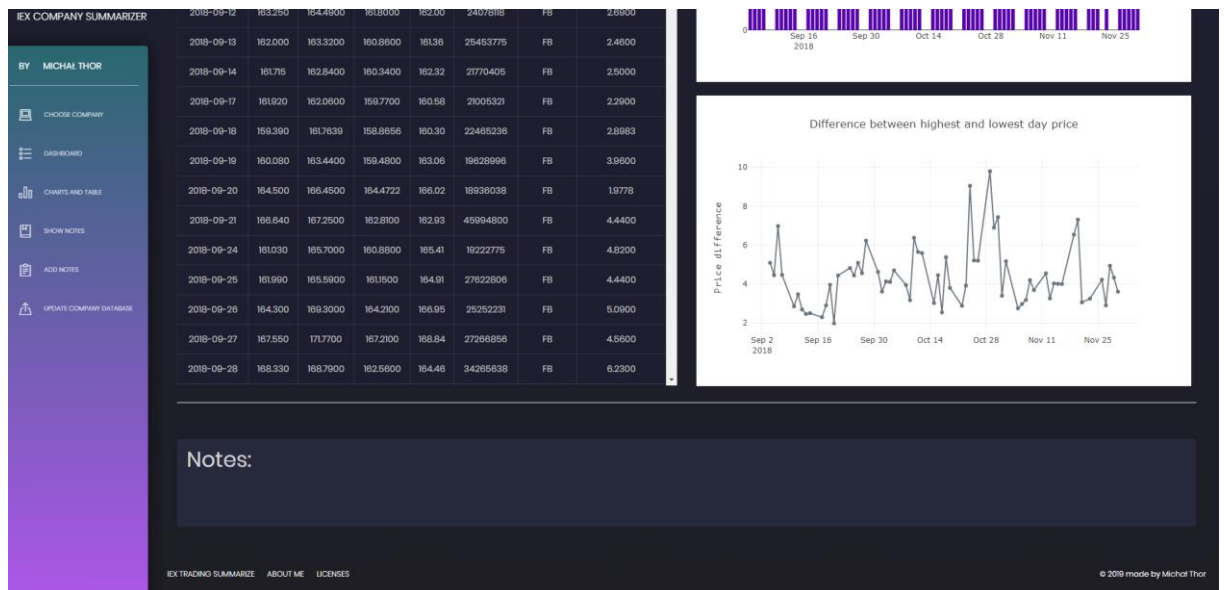
5. [DASHBOARD] You are now in the **Dashboard** window. It is also accessible from the **Starting Screen** by clicking **Dashboard** on the **Navigation Bar** like suggested in point 5.2 (default values will be shown if you did not fill the forms and just skipped to **Dashboard**).



- 5.1. On the top you have basic information about the company, clickable website address and 4 key financial indicators.
- 5.2. [CHARTS AND TABLE] Below you can see **Charts and Table** with company stock information regarding the period you wanted in the form. Option **Charts and Table** in the **Navigation Bar** transfers you to this place on the webpage immediately.



5.3. [SHOW NOTES] Below you can see **Notes** concerning given company. Option **Show Notes** in the **Navigation Bar** transfers you to this place on the webpage immediately.



6. [ADD NOTES] By clicking **Add Notes** option you are transferred to the adding note page.

The screenshot shows the 'Add Notes' page of the 'IEX COMPANY SUMMARIZER' application. On the left is a vertical sidebar with a purple-to-teal gradient, containing a menu with the following items: 'BY MICHAŁ THOR', 'CHOOSE COMPANY', 'DASHBOARD', 'CHARTS AND TABLE', 'SHOW NOTES', 'ADD NOTES' (highlighted), and 'UPDATE COMPANY DATABASE'. The main content area is dark blue and contains the text 'Add your note for FB' at the top. Below this is a text input field labeled 'Note:' and a 'SUBMIT' button. At the bottom of the page, there is a footer with links to 'IEX TRADING SUMMARIZER', 'ABOUT ME', and 'LICENSES', and a copyright notice '© 2019 made by Michał Thor'.

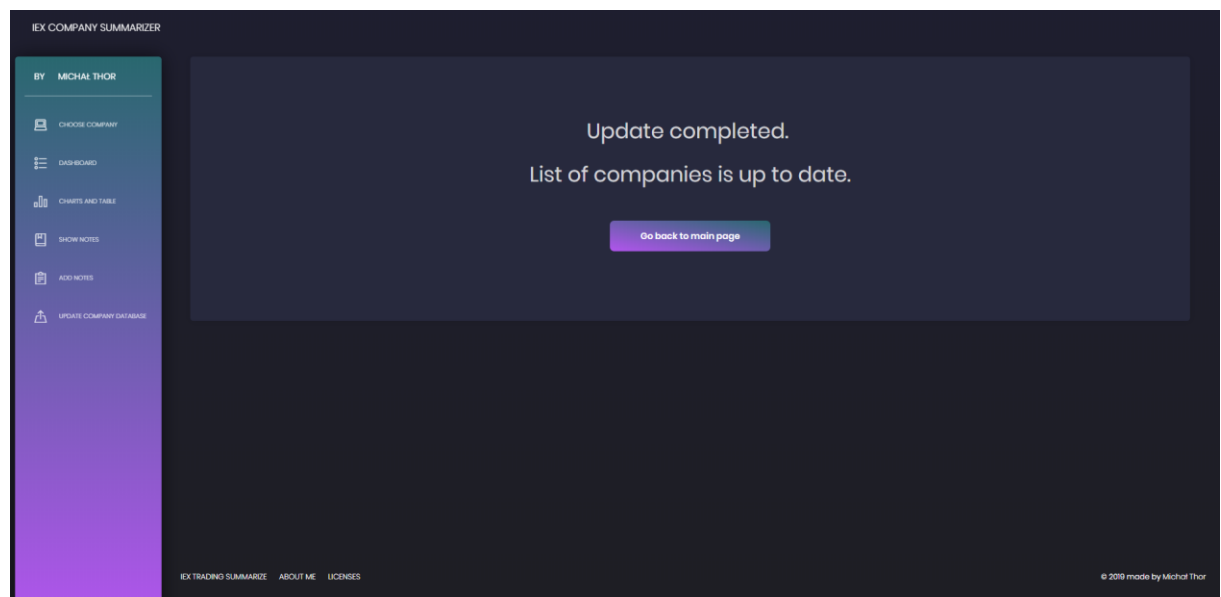
6.1. You can only add note to the company you are currently viewing. If you did not fill out the form on the **Starting Screen** you will not be able to add note to the default company.

6.2. Type your desired note and click submit to confirm addition.

6.3. If everything went ok, you will see the success screen with the option to go back to the **Dashboard** screen with your updated note.

The screenshot shows the 'Note uploaded' success screen of the 'IEX COMPANY SUMMARIZER' application. The layout is identical to the previous screenshot, with the same sidebar and footer. The main content area now displays the text 'Note uploaded.' followed by 'You can check it on the main page of a given company.' and a 'Go back to the dashboard' button. The footer remains the same, with links to 'IEX TRADING SUMMARIZER', 'ABOUT ME', and 'LICENSES', and the copyright notice '© 2019 made by Michał Thor'.

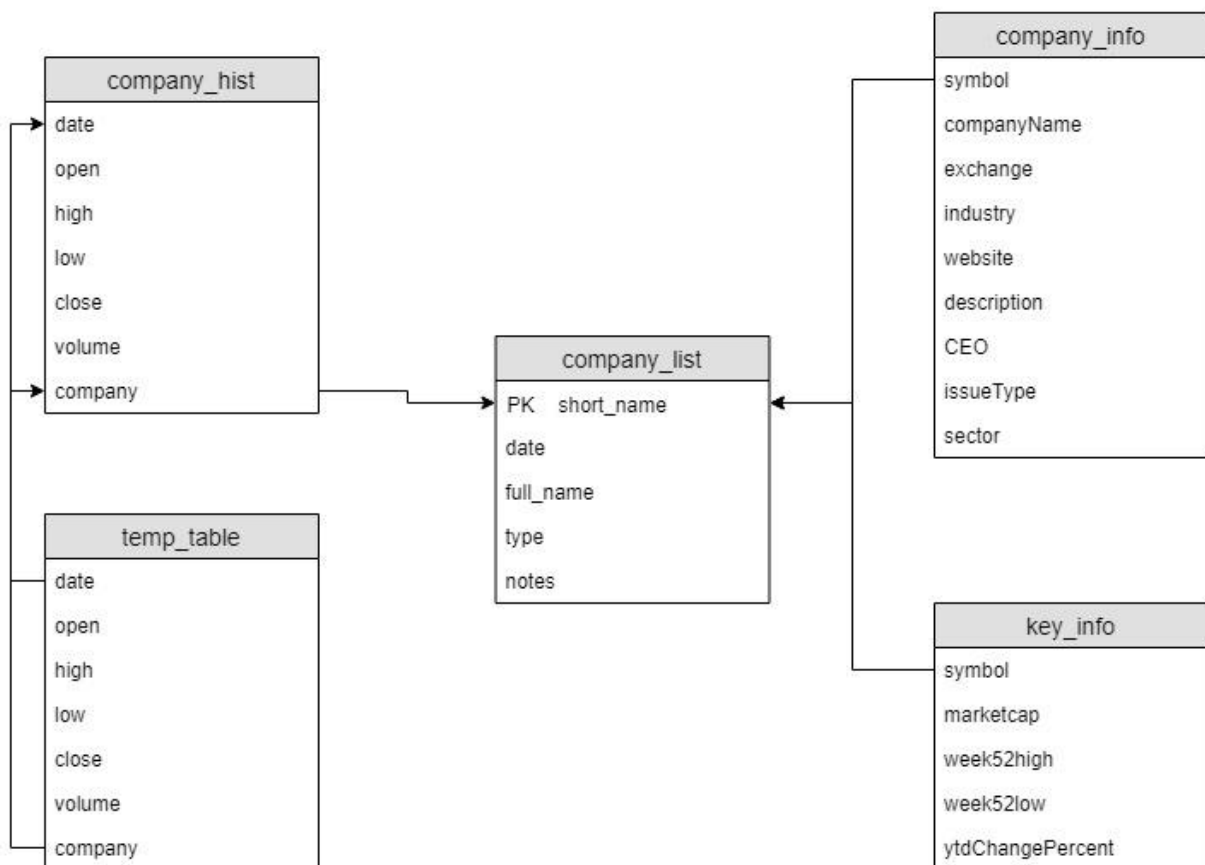
7. [UPDATE COMPANY DATABASE] By clicking **Update Company Database** you will re-download list of all of the companies on IEX stock exchange to update the list of available companies to choose from.
- 7.1. **IMPORTANT NOTE** – updating database will erase all previous notes for all of the companies.
- 7.2. If everything went ok, you will see the success screen with the option to go back to the **Starting Screen** to choose company from your updated database.



8. Database structure

- 8.1. **company_list** table consists of names (full and short) of companies along with the date it was downloaded from IEX Database and notes (added from the application). Column *short_name* is the Primary Key in this table.
- 8.2. **company_hist** table consists of company name which is Foreign Key on which it is connected to **company_list** and all the stock information about the given company for the day given in the *date* column (open – opening price, high is highest price, low – lowest, close – closing price, volume is volume during given day).
- 8.3. **temp_table** table has structure similar to the one of **company_hist**. It is used when adding new records to the **company_hist** table to check for duplicates.
- 8.4. **company_info** table consists of basic information about the company. Column *symbol* is the Foreign Key on which it is connected to **company_list**.
- 8.5. **key_info** table consists of financial information about the company. It also uses *symbol* column as a Foreign Key to **company_list**.

IEX Company Summarizer - Database ER Diagram



FURTHER DEVELOPMENT:

- improve charts by adding ability to show desired values on axes
- make use of the (implemented but not used) function comparing already existing database entries
- store notes in different table so they do not get erased when importing updated database
- add live stock price ticker feature
- ability to fully compare different companies
- optimize code and wrap functions into classes