IEX COMPANY SUMMARIZER v1.0 – DOCUMENTATION

1. Open folder “python\_intro\_project”.
2. Open console (cmd.exe or bash) in the folder and download all needed libraries by typing:
   1. pip install -r requirements.txt
3. Run .py file named “IEX\_Company\_Sum”.
4. In your browser (DO NOT USE IE/Edge) open: <http://localhost:8081/>.
5. [CHOOSE COMPANY] You should see that screen (**Starting Screen**): Obraz zawierający zrzut ekranu, monitor

   Opis wygenerowany automatycznie
   1. From the dropdown form you can choose any company listed on IEX Stock Exchange
      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.
      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.
      3. Click “Submit” button that will transfer you to **Dashboard** (all 3 forms have to be properly entered to gain access to dashboard).
   2. You can also choose different content from the **Navigation Bar.**
6. [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**).
   1. On the top you have basic information about the company, clickable website address and 4 key financial indicators.
   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.
   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.
7. [ADD NOTES] By clicking **Add Notes** option you are transferred to the adding note page.
   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.
   2. Type your desired note and click submit to confirm addition.
   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.
8. [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.
   1. IMPORTANT NOTE– updating database will erase all previous notes for all of the companies.
   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.