

SECOND TASK REQUERIMENTS

**Alex Gómez Clavero
Gabriel Cadafalch Chavez
Alex García Martínez
ABP - Project 2: ERP
DAM 2 M**

INDEX

Search of an ERP	4
1. What is an ERP?	6
2. Types of ERP	7
3. Advantages and disadvantages of ERP	8
4. Objectives of an ERP	9
5. Characteristics and configuration of the investigated ERPs	10
5.1. ERP Dolibarr investigated (Alex Gómez)	10
5.1.1. Characteristics	10
5.1.2. Functionalities	11
5.1.2.1. Creation of new modules	12
5.1.3. Demo screens	13
5.2 Katana ERP (Gabriel)	17
5.2.1 Functionalities	18
5.2.3 Characteristics	18
5.2.4 Demo screens	19
5. 3 ERP Tryton investigated (Alex García)	26
5.3.1 Functionalities	26
5.3.2 Characteristics	27
5.3.3 Demo screens	27
Non-functional requirements	35
Functional requirements	36
Actors	38
Mockups	40
Planning of the implementation cost	44
Diagram case	45
Global	45
By modules	46
Requirement Detail	49
ALUMNI MANAGEMENT MODULE	49
Register	49
Login	49
View Student	50
Delete user	50
Select user (Read user's profile)	50
Filters (Degree, Mark, Curs, etc.)	51
Search user by name/surname	51
Order by parameter	51
PROFILE MANAGEMENT MODULE	52
Edit user profile	52
Edit alumni average grade	52
FORUM MANAGEMENT MODULE	53

View Forum	53
Search Post	53
Select Post (read)	53
Create Post	54
Edit Post	54
Delete Post	54
ANNOUNCEMENTS MODULE	55
New Announcement	55
ROLE MANAGEMENT MODULE	56
View roles	56
Assign role to user	56
Remove role to user	56
Assign role to module	57
Remove role to module	57
STATISTICS MODULE	58
View graphics	58
Filter graphs	58
Generate PDF	58
Navigations Screens	59
Class Diagram	60
Database Model	61
Architecture Diagram	62
Sprint 1	63
Daily Stand Up meeting & Retrospective meeting:	64

Search of an ERP

RESEARCH ON ERP

**Alex Gómez Clavero
Gabriel Cadafalch Chavez
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INDEX

1. What is an ERP?	3
2. Types of ERP	4
3. Advantages and disadvantages of ERP	5
4. Objectives of an ERP	6
5. Characteristics and configuration of the investigated ERPs	7
a. Configuration	8
Functionalities	8
Characteristics	10
Demo screens	11
5.2 Katana ERP (Gabriel)	12
5.2.1 Configuration	12
5.2.2 Functionalities	12
5.2.3 Characteristics	12
5.2.4 Demo screens	13
ERP Tryton investigated (Alex)	14
Functionalities	14
Characteristics	15
Demo screens	15

1. What is an ERP?

An ERP is software that companies use to manage their day-to-day business activities in a single system, which is composed of different modules. The most common of which are:

- Human Resources
- Finance
- Inventory

An ERP also contains a user management system (CRM), to manage different kinds of roles, such as an administrator, user, etc.

Thanks to an ERP, a company can centralize all its processes and provide employees with all the data in real time.

2. Types of ERP

Some types of ERP are:

- **Generalists:** They are ERPs that are focused to cover various types of industries.
- **Specific:** They are ERPs focused on a single sector, such as health, education, agriculture...
- **Cloud-based:** These are ERP systems that run in the cloud, allowing companies to access their functions and data via the internet. These systems typically offer scalability, flexibility and ease of access from anywhere with an internet connection.
- **Modular:** Are structured in a modular way, which means that modules can be added or removed according to the specific needs of the company.

3. Advantages and disadvantages of ERP

Advantages	Disadvantages
Process automation	Completeness
Data unification	Adaptation to the ERP
Improved productivity through easy access to data	Supplier dependence

4. Objectives of an ERP

The objective of an ERP is to find a good productivity and efficiency for a company.

An ERP has to unify and centralize all the company's processes and data, processes that can be organized in modules, and allow the company to adapt to its own changes.
organized by modules, and allow the company to adapt to its own changes.

To facilitate the work of employees, it must also automate repetitive tasks to avoid errors.
avoid failures.

5. Characteristics and configuration of the investigated ERPs

5.1. ERP Dolibarr investigated (Alex Gómez)

It is a free open source ERP/CRM software package for small and medium enterprises, foundations or independent professionals. It is a web application and can therefore be used from any web browser that has access to the Internet. Despite the large number of features it implements, Dolibarr aims to be a simple solution for people without technical knowledge due to its ease of installation and use.

5.1.1. Characteristics

ERP Name	Dolibarr ERP/CRM
URL	Dolibarr Open Source ERP y CRM: web package
Development company	Rodolphe Quiedeville (2002-2008 former lead developer) Dolibarr Foundation (2009 actual)
Launch date	The first shared version was completed in September 2003.
Development country	France
Licence	It is an open source project, it allows anyone to analyze it and modify its code as it suits them. GNU General Public License
Platforms	It is compatible with Linux, Mac and Windows devices.
Online	The Dolibarr application can be installed and used as a local or online application. Can be used from anywhere, on any device.
Versions	Releases - Dolibarr ERP CRM Wiki Latest Dolibarr ERP Release - CRM - SourceForge.net
Development language	Dolibarr is developed in PHP. Dolibarr works with all PHP configurations and does not require any specific or add-on PHP modules For now it only supports the MySQL database. It's been designed to work with the most possible servers or hosts.
Technical requirements	The ERP only requires an OS that supports a web server with PHP (minimum 5.6.0+) and a SQL database (MySQL 5.1+), with a minimum of 200MB of space for the operation of the ERP (not counting the extra modules or additional content attached).
CRM included	Yes, you have complete functionality for the management of Customer Relations Management.
Price	The software is free, but if you don't want to install it and prefer to use the web version there are different offers, such as a 15-day free trial with subsequent payment.

5.1.2. Functionalities

Mainly maintains Business Resource Planning and Human Relations Management functions. It is a perfectly modifiable and adaptable model that can adapt to the needs of each company.

Details of the main modules include:

- CRM & Sales
 - Prospects / Customers
 - Opportunities
 - Proposals
 - Sales orders
 - Contracts / Subscriptions
 - Help desk / Tickets

All control of sales, management, customers and contacts and manage your order workflow and product stock according to your needs.

- Human Relationship Management (HR)
 - Employees
 - Expense Reports
 - Leave Requests
 - TimeSheets
 - Recruitment
 - Membership

It allows you to manage your company's human resources in an easy and simple way. Administration of users, user groups and permissions, control of expenses, request for permissions for employees and control of hours spent.

- CMS, Website, POS
 - CMS / Website
 - E-commerce
 - Point of sale

A CMS module to build your website in minutes and gives you an online point of sale with its own e-commerce platform.

- Product & Stock
 - Products, Services
 - Stock
 - Purchase, approvisionnement
 - Shipments
 - Production

It allows you to manage your catalog of products and services, control the workflow of orders, and list the materials and resources for manufacturing.

- Finance & Billing
 - Billing & Payments
 - Bank reconciliation
 - Double entry accounting

It allows you to manage your catalog of products and services, control the workflow of orders, and list the materials and resources for manufacturing.

- Marketing
 - Mail
 - Forms

Email service imbued for easy use and contact with the outside, survey system to take into account the opinion of any topic of your employees or contacts of interest.

- Productivity
 - Projects, Tasks
 - Interventions
 - Schedule

Perfect module for monitoring the company's projects, facilitating the collection of data on potential customers and opportunities, manages the interventions to invoice the customer and control the activity through the agenda integrated in the ERP and CRM.

- Integration, Development
 - API
 - Connectivity with external tools
 - Import and export
 - Module builder for developers

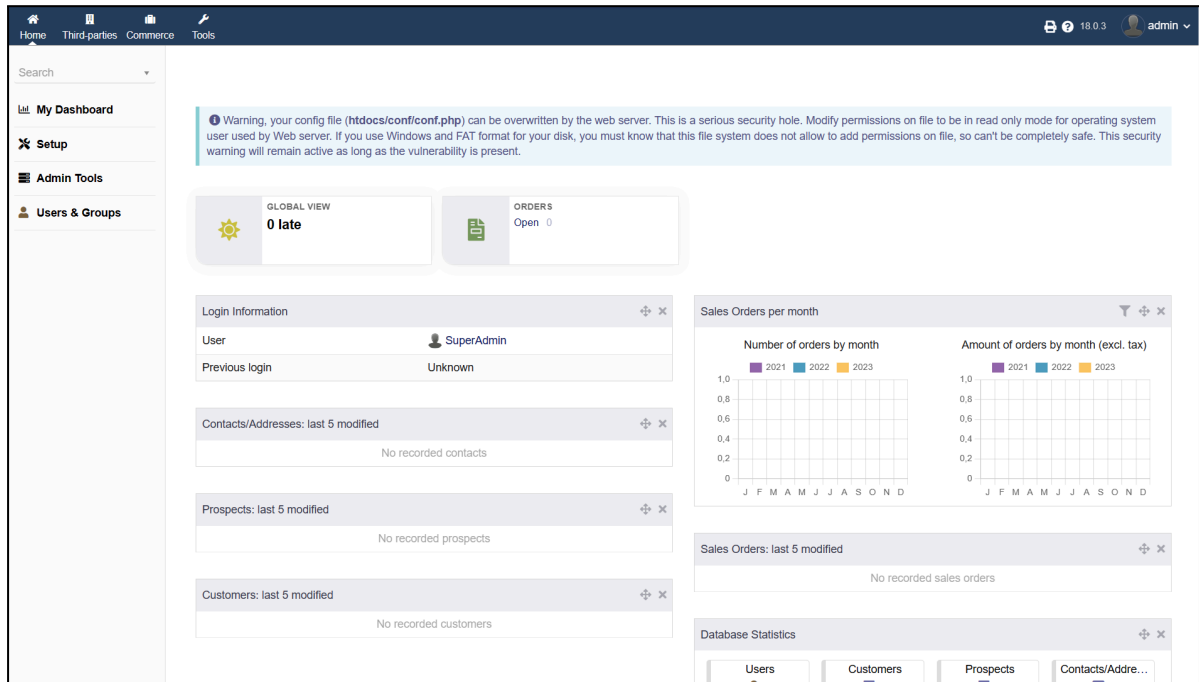
They allow the integration of any application with Dolibarr with the API and Hooks and data import/export.

5.1.2.1. Creation of new modules

If you have knowledge of SQL and PHP, you may use the native module builder wizard to create new modules.

5.1.3. Demo screens

- Main screen



Here you can see the general information and data of the application.

- Setup Screen

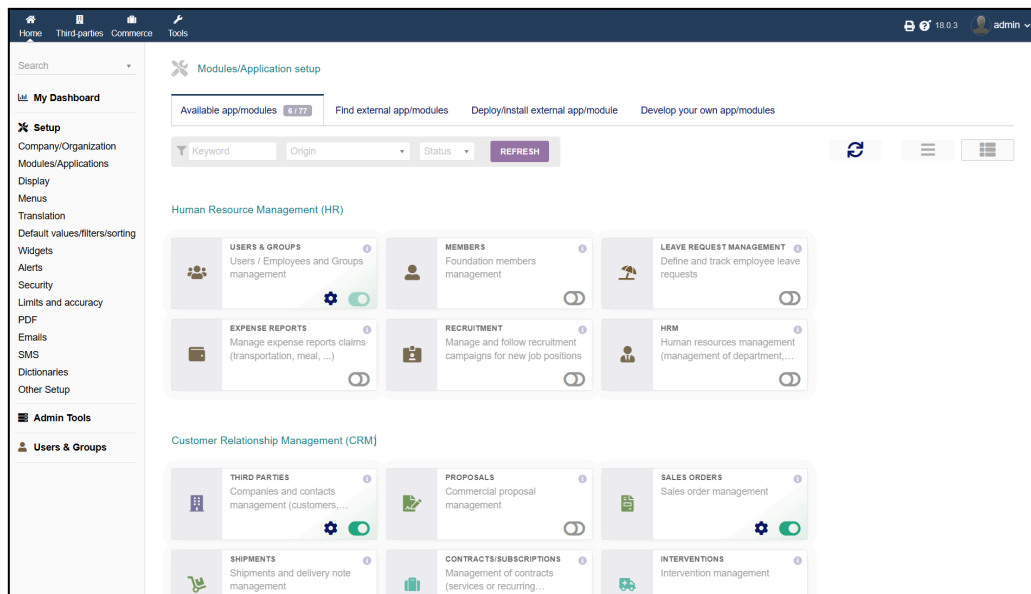
These screens are mainly for setting and updating different settings of the ERP configuration

- Company data screen

The screenshot shows the 'Company/Organization' setup screen. The navigation bar is the same as the main screen. The sidebar has 'My Dashboard', 'Setup', 'Admin Tools', and 'Users & Groups'. The main content area is titled 'Company/Organization' and has tabs for 'Company', 'Opening hours', 'Accountant', and 'Social networks'. Below the tabs, there's a message: 'Edit the information of your company/organization. Click on "Save" button at the bottom of the page when done.' The form contains the following fields: Name (empresa), Address (algun sitio), Zip (08224), Town (terrassa), Country (Spain (ES)), State/Province (B - Barcelona), Main currency (Euros (€)), Phone, Fax, EMail, Web, Logo (Elegir archivo), and Logo (squared) (Elegir archivo). The 'Logo' fields have a message: 'No se ha seleccionado ningún archivo'.

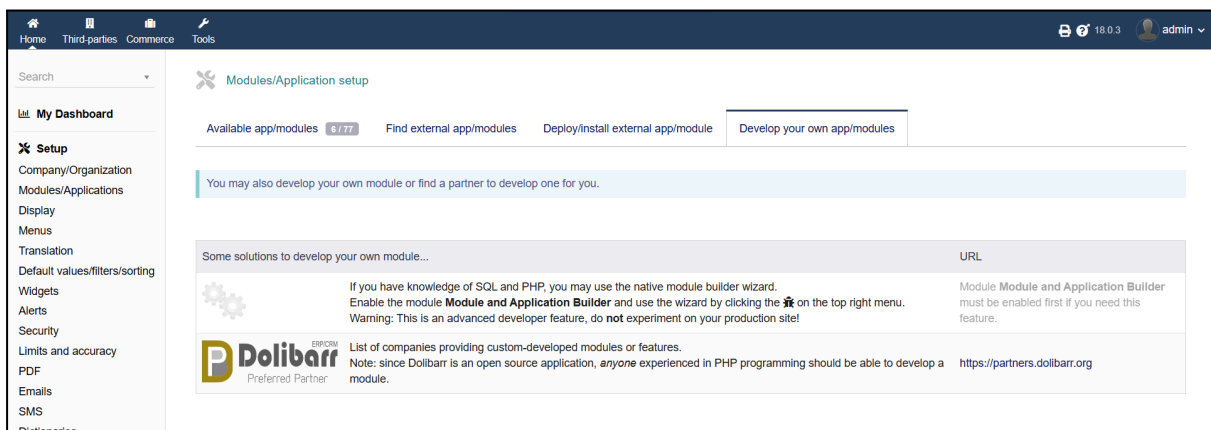
Here you can modify the company data and different configurations.

○ Module screen

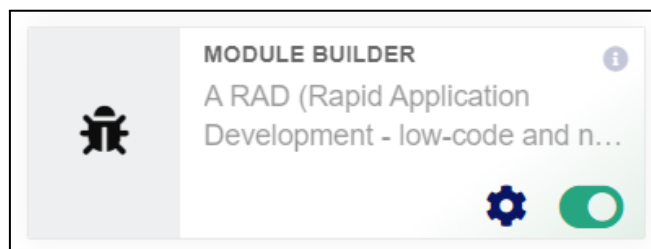


You can enable which modules you want to have in the ERP. You can also add external modules from different sources or create your own modules, even commission them from another party.

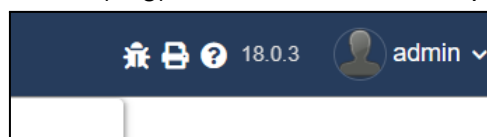
○ Create new module



Enable the module “Module and Application Builder” on “Available App/modules”



and use the top right corner menu (bug) use the “Module and Application Builder”.



Home

Third-parties

Commerce

Tools

Search

My Dashboard

Setup

Admin Tools

About Dolibarr

About Browser

About OS

About Web Server

About PHP

About Database

About Performances

About Security

Security events

Users Sessions

Backup

Restore

Upgrade / Extend

Purge

External Resources

Module and Application Builder

This tool must be used only by experienced users or developers. It provides utilities to build or edit your own module. Documentation for alternative manual development is here.

New module

Danger zone

Module ID

500000

(See IDs in use in your installation - See range of reserved IDs)

Module name

Description

Version

1.0

Family

Other

Picto

fa-file-o

Name of editor

empresa

URL of editor

URL of editor

CREATE

Home

Third-parties

Commerce

Tools

Search

My Dashboard

Setup

Admin Tools

About Dolibarr

About Browser

About OS

About Web Server

About PHP

About Database

About Performances

About Security

Security events

Users Sessions

Backup

Restore

Upgrade / Extend

Purge

External Resources

Module and Application Builder

This tool must be used only by experienced users or developers. It provides utilities to build or edit your own module. Documentation for alternative manual development is here.

New module

Aaaaaaaaaa

Danger zone

Description

Objects

Languages

Dictionaries

Permissions

Tabs

Menus

Hooks

Triggers

Widgets

Export-Import

CSS

JS

CLI

Scheduled jobs

More... (2)

Enter here all general information that describe your module.

Descriptor file of module : aaaaaaaaaa/core/modules/modAaaaaaaaaa.class.php

Readme file : aaaaaaaaaa/README.md

ChangeLog file : aaaaaaaaaa/ChangeLog.md

Descriptor file of module

Parameter	Value
Module ID	500000 (See IDs in use in your installation - See range of reserved IDs)
Module name	Aaaaaaaaaa
Description	Aaaaaaaaaa description

○ Display Screen

Home

Third-parties

Commerce

Tools

Search

My Dashboard

Setup

Company/Organization

Modules/Applications

Display

Menus

Translation

Default values/filters/sorting

Widgets

Alerts

Security

Limits and accuracy

PDF

Emails

SMS

Dictionaries

Other Setup

Admin Tools

Users & Groups

Display

Parameters affecting the look and presentation of the application can be modified here.

Language and presentation

Skin and colors

Dashboard

Login page

CSS Style

Language

Default language

English (United States) (en_US)

Enable multilanguage support for customer or vendor relationships

SAVE

CANCEL

Miscellaneous

Show a button to quickly add an element in top right menu

Hide the link to the online help "Q"

Default max length for lists

Default max length for short lists (i.e. in customer card)

Parameters affecting the look and presentation of the application can be modified here.

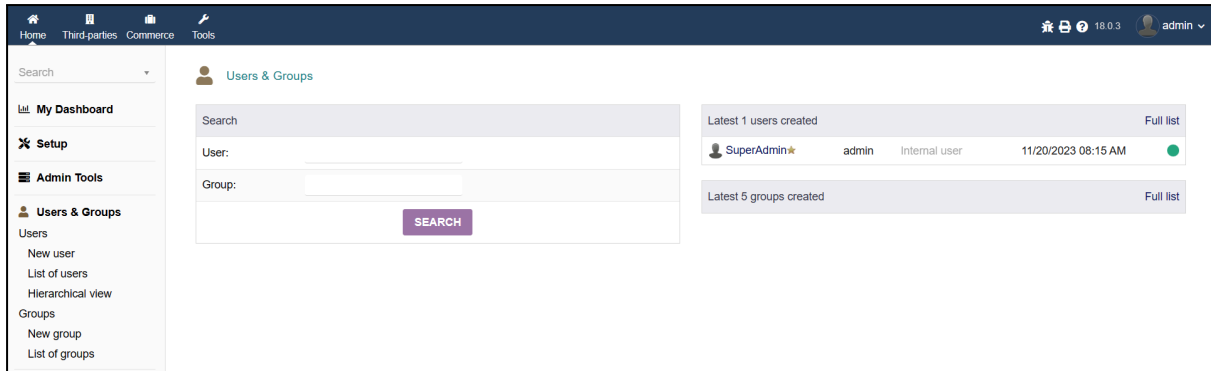
More screens can be seen on the Setup section, all managing different parts of the ERP.

- Administration Screen
 - Informative Screens

image

text

- Users & Groups Screen



This screen allows you to search, create and manage different users and groups.

5.2 Katana ERP (Gabriel)

ERP Name	Katana MRP
URL	https://katanamrp.com/
Development company	Katana
Launch date	2018
Development country	Estonia
Licence	
Platforms	All (Cloud-based)
Online	Yes
Actual version	1.0
Development language	Unknown, but in the developer section, the Katana API, shows the resources section in which you can see different programming languages. Some of them are Shell, Python, Java and C++.
Technical requirements	None / Not found
CRM included	Yes
Free	No, Subscription-based.

5.2.1 Functionalities

The main characteristics that offer this specific ERP are:

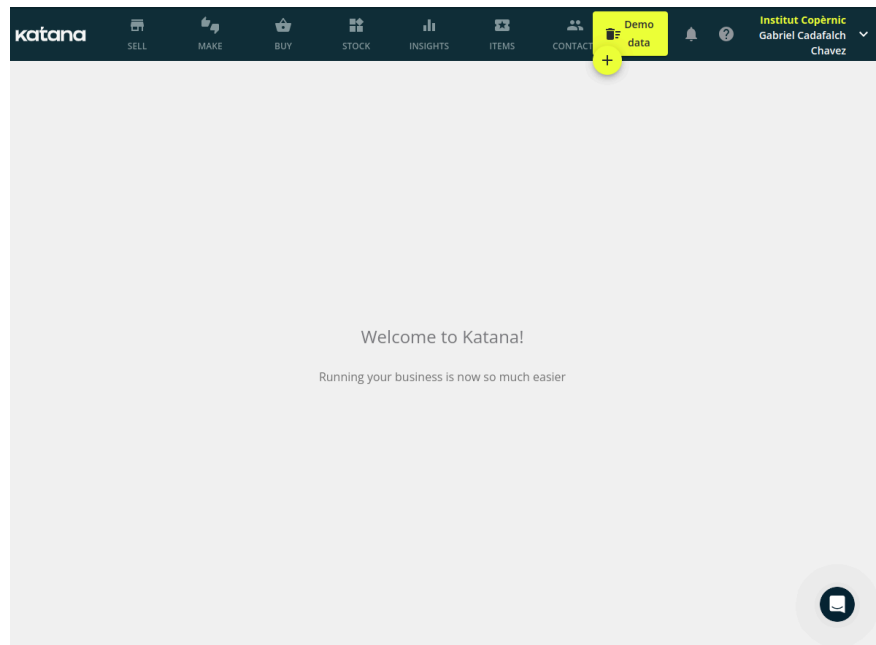
- **Inventory management:** The software focuses on efficient inventory management, offering real-time tracking, order management, and tools for setting reorder points.
- **Material Requirements Planning (MRP):** The MRP functionality helps in calculating the materials needed for production based on current inventory levels, sales orders, and production schedules.
- **Production planning and scheduling:** Katana MRP assists users in planning and scheduling production tasks based on demand. It helps optimize resource allocation for manufacturing processes which is also another characteristic of this software.
- **Integration capabilities:** Katana MRP integrates with other business tools, such as e-commerce platforms, accounting software, and CRMs (Customer Relationship Management), to streamline workflows and enhance overall business efficiency.
- **Customization options and scalability:** The company that runs the ERP may offer customization options, allowing businesses to adjust the software to their needs. And the software is designed to scale with the growing needs of the business, being in size or complexity.

5.2.3 Characteristics

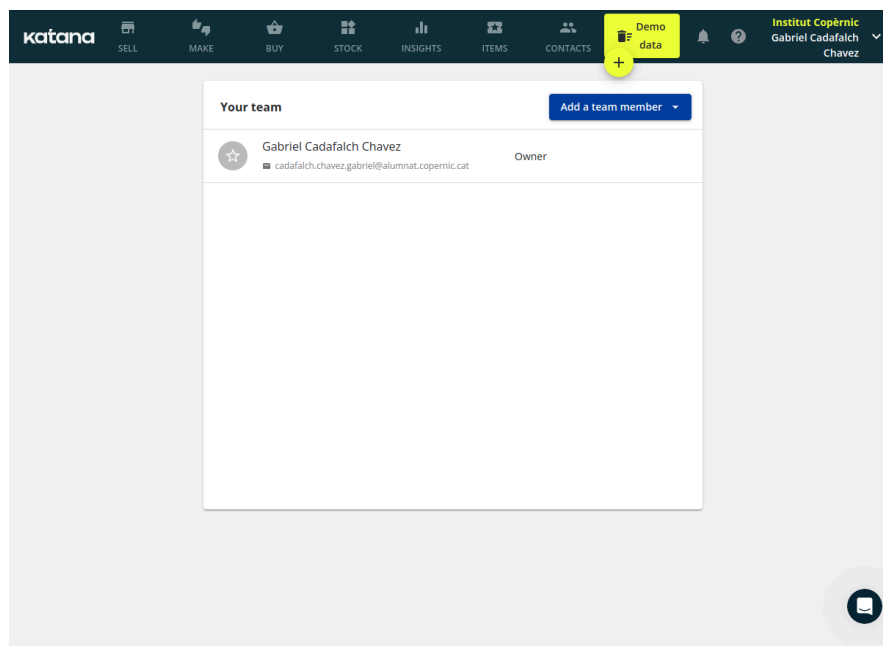
The standard language of the software is English, but because Katana supports applying Google Translate extension functionality to the software that enables using Katana in any language. Katana MRP is designed with an intuitive and user-friendly interface to provide a clear overview of production processes, inventory and other essential business aspects.

5.2.4 Demo screens

Layout:



Users:



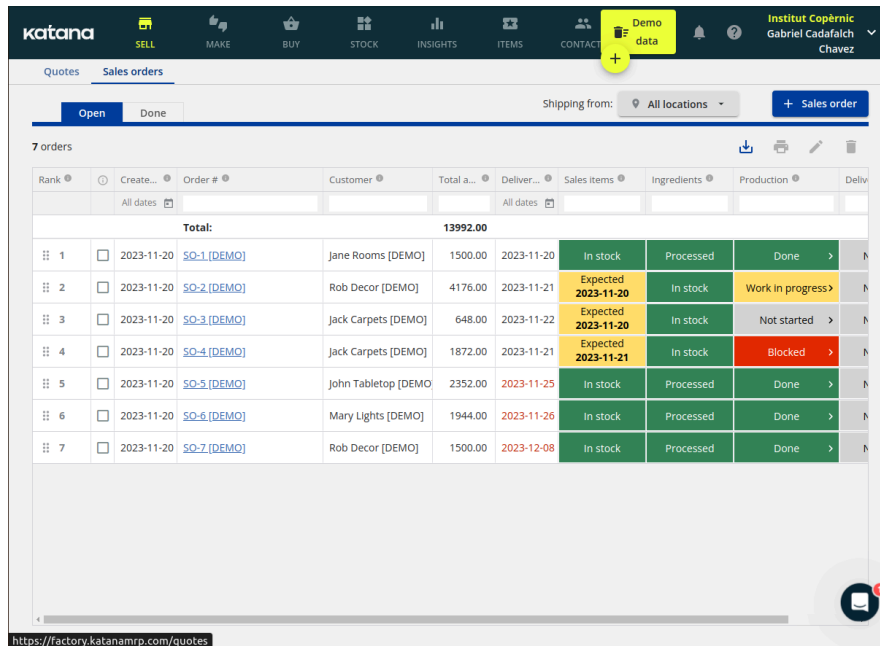
As this is an ERP which targets businesses, the users are employees of said company.

So, the roles that can be assigned to the users of the ERP are 'Users' that can access all of the modules or set custom permissions to this employee. The other role that can be assigned is Operator

which cannot access the main ERP, instead they access a Shop-Floor application. This app is the one that the business uses to Monitor raw material usage, operational task progress, stock counts, and order fulfillment with shop floor control software that gives the complete visibility needed for the company.

Modules:

Sales:



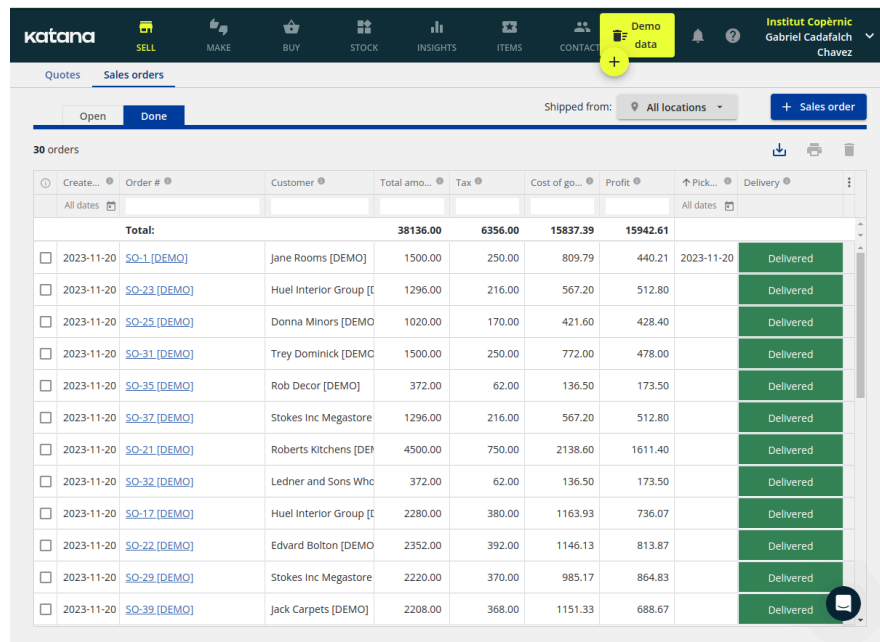
The screenshot shows the 'Sales orders' module in the Katana software. The interface includes a top navigation bar with icons for SELL, MAKE, BUY, STOCK, INSIGHTS, ITEMS, and CONTACT. A 'Demo data' button is highlighted. The main area displays a list of 7 orders. The table columns are: Rank, Create date, Order #, Customer, Total a.m., Deliver date, Sales items, Ingredients, Production, and Delivery status. The orders are currently in various stages of completion, with some marked as 'In stock', 'Processed', 'Done', 'Expected', 'Work in progress', 'Not started', or 'Blocked'.

Rank	Create...	Order #	Customer	Total a.m.	Deliver...	Sales items	Ingredients	Production	Deliv
Total:				13992.00					
1	2023-11-20	SO-1 [DEMO]	Jane Rooms [DEMO]	1500.00	2023-11-20	In stock	Processed	Done	
2	2023-11-20	SO-2 [DEMO]	Rob Decor [DEMO]	4176.00	2023-11-21	Expected 2023-11-20	In stock	Work in progress	
3	2023-11-20	SO-3 [DEMO]	Jack Carpets [DEMO]	648.00	2023-11-22	Expected 2023-11-20	In stock	Not started	
4	2023-11-20	SO-4 [DEMO]	Jack Carpets [DEMO]	1872.00	2023-11-21	Expected 2023-11-21	In stock	Blocked	
5	2023-11-20	SO-5 [DEMO]	John Tabletop [DEMO]	2352.00	2023-11-25	In stock	Processed	Done	
6	2023-11-20	SO-6 [DEMO]	Mary Lights [DEMO]	1944.00	2023-11-26	In stock	Processed	Done	
7	2023-11-20	SO-7 [DEMO]	Rob Decor [DEMO]	1500.00	2023-12-08	In stock	Processed	Done	

In this module you can keep track of your sales with the fields: Rank, Creation date, Order, Customer, Total order value, Delivery date, Sales items, Ingredients, Production and Delivery status.

When an order is fully delivered, this one will show in the done orders, a list of orders that are delivered or packed.

This is the window that shows the done sale orders:



The screenshot shows the 'Sales orders' module in the Katana software, filtered to show 'Done' orders. The interface is similar to the previous screenshot, but the 'Open' button is disabled, and the 'Done' button is active. The table displays 30 orders that have been fully delivered. The columns include: Create date, Order #, Customer, Total amo., Tax, Cost of go., Profit, Pick date, and Delivery status. All orders are marked as 'Delivered'.

Create...	Order #	Customer	Total amo.	Tax	Cost of go.	Profit	Pick...	Delivery
Total:			38136.00	6356.00	15837.39	15942.61		
2023-11-20	SO-1 [DEMO]	Jane Rooms [DEMO]	1500.00	250.00	809.79	440.21	2023-11-20	Delivered
2023-11-20	SO-23 [DEMO]	Huel Interior Group [DEMO]	1296.00	216.00	567.20	512.80		Delivered
2023-11-20	SO-25 [DEMO]	Donna Minors [DEMO]	1020.00	170.00	421.60	428.40		Delivered
2023-11-20	SO-31 [DEMO]	Trey Dominick [DEMO]	1500.00	250.00	772.00	478.00		Delivered
2023-11-20	SO-35 [DEMO]	Rob Decor [DEMO]	372.00	62.00	136.50	173.50		Delivered
2023-11-20	SO-37 [DEMO]	Stokes Inc Megastore	1296.00	216.00	567.20	512.80		Delivered
2023-11-20	SO-21 [DEMO]	Roberts Kitchens [DEMO]	4500.00	750.00	2138.60	1611.40		Delivered
2023-11-20	SO-32 [DEMO]	Ledner and Sons Whc	372.00	62.00	136.50	173.50		Delivered
2023-11-20	SO-17 [DEMO]	Huel Interior Group [DEMO]	2280.00	380.00	1163.93	736.07		Delivered
2023-11-20	SO-22 [DEMO]	Edvard Bolton [DEMO]	2352.00	392.00	1146.13	813.87		Delivered
2023-11-20	SO-29 [DEMO]	Stokes Inc Megastore	2220.00	370.00	985.17	864.83		Delivered
2023-11-20	SO-39 [DEMO]	Jack Carpets [DEMO]	2208.00	368.00	1151.33	688.67		Delivered

The user 'User' or Owner (the one that created the account of the ERP) can change the values of these fields int this screen that shows when you click on the order:

Quotes

Sales orders

Sales order

SO-1 [DEMO] Jane Rooms [DEMO]

Not shipped

All changes saved

Customer

Jane Rooms [DEMO]

Customer reference #

Reference number

Delivery deadline

2023-11-20

Created date

2023-11-20

Sales order #

SO-1 [DEMO]

Ship from

Main location

Bill to

Enter address...

Ship to

Same as billing address

Items not shipped

Tracking info

	Item	Quantity	Price p...	Total p...	Tax %	Sales items	Ingredients	Production
1.	[DT-BR] Dining table [DEMO] / brown	1 pcs	1250 USD	1250 USD	20% - V...	In stock	Processed	Done

+ Add row

Total items not shipped (with Tax): 1500.00 USD

Shipping fee

Description	Cost	Tax
	0 USD	-

Total shipping fee (with Tax): 0.00 USD

Total units:

1 pcs

Subtotal (Tax excluded):

1250.00 USD

Shipping fee (Tax excluded):

0.00 USD

Plus Tax:

250.00 USD

Total:

1500.00 USD

Additional info

B I U

Type comment here

If you click on the add row label, it will show another row in the items not shipped, in which you can search or create an item to this specific sale. If you want to delete the row you can click on the 'more options' button next to the production status button to show the delete option.

Make:

The screenshot shows the Katana 'Make' module interface. At the top, there's a navigation bar with icons for SELL, MAKE, BUY, STOCK, INSIGHTS, ITEMS, and CONTACT. A 'Demo data' button is highlighted. Below the navigation bar, there's a 'Schedule' tab selected, with a 'Tasks' tab also visible. The main area displays a table of 11 orders. The table has columns for Customer, Product, Completed quantity, Quantity, Planned production time, Production deadline, Delivery deadline, Ingredients, and Production status. The orders are listed with their respective details, including product names like 'Dining table', 'Television stand', 'Coffee table', 'Lounge chair', and 'Lounge chair'. The production status for each order is indicated by a color-coded box: 'In stock' (green), 'Work in progress' (yellow), 'Not started' (grey), 'Not available' (red), and 'Blocked' (orange).

Rank	Order	Customer	Product	Category	Completed	Quantity	Planned production time	Production deadline	Delivery deadline	Ingredients	Production status
1	1	Rob Decor [DEMO]	[DT-BE] Dining table [T]	T	0 pcs	1 pcs	15 h	2023-11-20	2023-11-21	In stock	Work in progress
2	2	Rob Decor [DEMO]	[TS-BRZ] Television stand [L]	L	0 pcs	1 pcs	14 h 40 m	2023-11-20	2023-11-21	In stock	Work in progress
3	1	Jack Carpets [DEMO]	[CT-BL] Coffee table [T]	T	0 pcs	1 pcs	9 h	2023-11-20	2023-11-22	In stock	Not started
4			[TS-BR] Television stand [L]	L	0 pcs	2 pcs	29 h 20 m	2023-11-21		Not available	Not started
5	1	Jack Carpets [DEMO]	[DT-BL] Dining table [T]	T	0 pcs	1 pcs	15 h	2023-11-21	2023-11-21	In stock	Blocked
6	2	Jack Carpets [DEMO]	[LC] Lounge chair [DE]	C	0 pcs	1 pcs	5 h 30 m	2023-11-21	2023-11-21	In stock	Blocked
7			[CT-BE] Coffee table [T]	T	0 pcs	1 pcs	9 h	2023-11-22		In stock	Not started
8			[LC] Lounge chair [DE]	C	0 pcs	3 pcs	16 h 30 m	2023-11-22		In stock	Not started
9			[TS-BR] Television stand [L]	L	0 pcs	1 pcs	14 h 40 m	2023-11-22		Not available	Not started
10			[DT-BE] Dining table [T]	T	0 pcs	2 pcs	30 h	2023-11-23		Expected 2023-12-02	Not started
11			[DT-BL] Dining table [T]	T	0 pcs	1 pcs	15 h	2023-11-23		In stock	Not started

This module is composed of two parts: Schedule and Tasks.

Schedule shows a table of the current fields: Rank, Order, Customer, Product, Category of the products, Completed quantity, Quantity, Planned production time, Production deadline, Delivery deadline, Ingredients and Production status.

If you click on one of the current orders it will show this window:

The screenshot shows the details of a specific manufacturing order in the Katana 'Make' module. The order is 'SO-2 [DEMO] / 1 [DT-BE] Dining table [DEMO] / beige' and is currently 'Work in progress'. The interface displays various fields for the order, including Manufacturing order #, Customer, Production deadline, Created date, Product, Delivery deadline, Planned quantity, and Total Cost. Below these fields, there are two main sections: 'Ingredients' and 'Operations'. The 'Ingredients' section shows a table with columns for Item, Notes, Planned/actual qty, Cost, and Availability. It lists two ingredients: '[W] Wood [DEMO]' and '[P-BE] Paint [DEMO] / beige'. The 'Operations' section shows a table with columns for Operation step, Resource, Planned/actual time, Cost, and Status. It lists four operations: 'Cutting [DEMO]', 'Gluing [DEMO]', 'Assembly [DEMO]', and 'Packaging [DEMO]'. Each operation has a corresponding resource and a status indicator.

Manufacturing order					
SO-2 [DEMO] / 1 [DT-BE] Dining table [DEMO] / beige					
Manufacturing order #		Customer	Production deadline	Created date	
SO-2 [DEMO] / 1		Rob Decor [DEMO]	2023-11-20	2023-11-20	
Product		Delivery deadline			
[DT-BE] Dining table [DEMO] / beige		2023-11-21			
Planned quantity	Total Cost				
1 pcs	800.18791 USD				
Ingredients					
	Item	Notes	Planned/actual qty	Cost	Availability
Total: 630.18791 USD					
1.	[W] Wood [DEMO]		15 / ... m	600.58791 USD	In stock
2.	[P-BE] Paint [DEMO] / beige		4 / ... l	29.6 USD	In stock
Operations					
	Operation step	Resource	Planned/actual ...	Cost	St...
Total: 15 h / 14 h 170 USD					
1.	Cutting [DEMO]	Table Saw [DEMO]	4 h / 4 h	40 USD	✓
2.	Gluing [DEMO]	Mary [DEMO]	2 h / 2 h	40 USD	✓
3.	Assembly [DEMO]	Assembly Station [DEMO]	8 h / 8 h	80 USD	✓
4.	Packaging [DEMO]	Packaging Desk [DEMO]	1 h / ...	10 USD	○

You can edit the next fields: Notes, Planned/Actual quantity, Cost, Availability, Operation step, Resource, Planned/Actual time, Cost and Status.

If you click the 'Buy' button it will show this window:

New purchase order

Material: [W] Wood [DEMO] Excess in stock: 847 m

Quantity: 1 m

Supplier: Wood Supplier [DEMO]

☐ Add other missing items from the same supplier to the purchase order.

Purchase order #: PO-1 Expected arrival: 2023-12-04

Buttons: Cancel, Create and open order, Create and close

This window is to order a new import of the said ingredient and you can modify the fields: Quantity, Supplier, Purchase order and Expected arrival date.

The Task part in this module shows this window:

Resource	MO #	MO de...	Del. de...	Product	Planne...	Operation	Planned time
▼ Mary [DEMO]					2 pcs		
	SO-3 [DEMO] / 1	2023-11-20	2023-11-22	[CT-BL] Coffee table [DEMO] /	1 pcs	Gluing [DEMO]	1
	MO-2 [DEMO]	2023-11-22		[CT-BE] Coffee table [DEMO] /	1 pcs	Gluing [DEMO]	1
▼ Table Saw [D...]					13 pcs		
	SO-3 [DEMO] / 1	2023-11-20	2023-11-22	[CT-BL] Coffee table [DEMO] /	1 pcs	Cutting [DEMO]	1
	MO-1 [DEMO]	2023-11-21		[TS-BR] Television stand [DEM	2 pcs	Cutting [DEMO]	
	SO-4 [DEMO] / 1	2023-11-21	2023-11-21	[DT-BL] Dining table [DEMO] /	1 pcs	Cutting [DEMO]	
	SO-4 [DEMO] / 2	2023-11-21	2023-11-21	[LC] Lounge chair [DEMO]	1 pcs	Cutting [DEMO]	
	MO-2 [DEMO]	2023-11-22		[CT-BE] Coffee table [DEMO] /	1 pcs	Cutting [DEMO]	1
	MO-3 [DEMO]	2023-11-22		[LC] Lounge chair [DEMO]	3 pcs	Cutting [DEMO]	
	MO-4 [DEMO]	2023-11-22		[TS-BR] Television stand [DEM	1 pcs	Cutting [DEMO]	
	MO-5 [DEMO]	2023-11-23		[DT-BE] Dining table [DEMO] /	2 pcs	Cutting [DEMO]	

This table shows the current fields: Resource (Person or Working station) assigned to the production operation, Manufacturing order number, Manufacturing order production deadline, Delivery deadline, Product, Planned quantity, Operation, Planned time and Status.

To add a row in this table, is inside the Operations part of the order inside the schedule table.

Buy:

This Module is to manage the Supplier orders, the purchasing table shows two orders: Open and Done.

The 'Open' view:

Shows a table with the fields: Created date, Order, Supplier, Total order value, Expected arrival and Delivery status.

The screenshot shows the Katana software interface for the 'Open' view of purchasing orders. The top navigation bar includes icons for SELL, MAKE, BUY, STOCK, INSIGHTS, ITEMS, and CONTACT. A 'Demo data' button is highlighted. The user is logged in as 'Institut Copărnici Gabriel Cadafalch Chavez'. The 'Purchasing' tab is active, and the 'Open' view is selected. The table displays 4 orders with columns for Created date, Order #, Supplier, Total order value, Expected arrival, and Delivery status. The total value for all orders is 476.16.

Created date	Order #	Supplier	Total order value	Expected arrival	Delivery
Total:			476.16		
2023-11-20	PO-2 [DEMO]	Furniture Crafting Products [	10.08	2023-11-20	Not received
2023-11-20	PO-3 [DEMO]	Paint Supplier [DEMO]	261.60	2023-11-21	Not received
2023-11-20	PO-4 [DEMO]	Furniture Crafting Products [	151.20	2023-11-23	Not received
2023-11-20	PO-5 [DEMO]	Paint Supplier [DEMO]	53.28	2023-12-02	Not received

When you change the delivery status to received, then this order moves to the Done view. The 'Done' view shows a table with the fields: Created date, Order, Supplier, Total order value, Received date and Delivery status. If you change back the Delivery status to not received, it moves back to the 'Open' view.

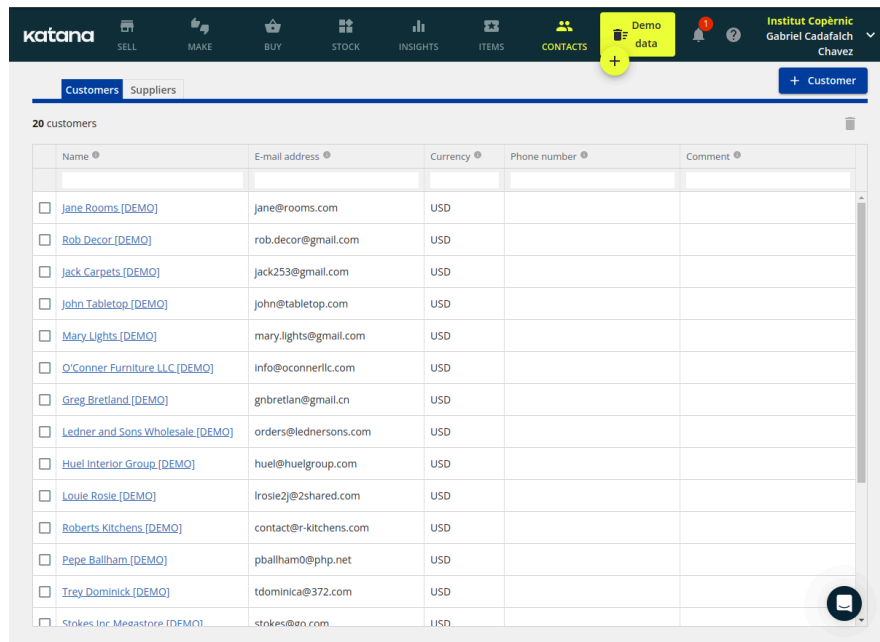
The screenshot shows the Katana software interface for the 'Done' view of purchasing orders. The top navigation bar is the same as the previous screenshot. The 'Purchasing' tab is active, and the 'Done' view is selected. The table displays 8 orders with columns for Created date, Order #, Supplier, Total order value, Received date, and Delivery status. The total value for all orders is 67722.24.

Created date	Order #	Supplier	Total order value	Received date	Delivery
Total:			67722.24		
2023-11-20	PO-6 [DEMO]	Paint Supplier [DEMO]	146.40	2023-11-20	Received
2023-11-20	PO-1 [DEMO]	Paint Supplier [DEMO]	269.76	2023-11-20	Received
2023-11-20	PO-7 [DEMO]	Wood Supplier [DEMO]	25200.00	2023-11-20	Received
2023-11-20	PO-8 [DEMO]	Furniture Crafting Products [	25.20	2023-11-20	Received
2023-11-20	PO-10 [DEMO]	Wood Supplier [DEMO]	24000.00	2023-09-13	Received
2023-11-20	PO-11 [DEMO]	Paint Supplier [DEMO]	1230.48	2023-08-24	Received
2023-11-20	PO-12 [DEMO]	Furniture Crafting Products [	50.40	2023-08-24	Received
2023-11-20	PO-9 [DEMO]	Wood Supplier [DEMO]	16800.00	2023-08-23	Received

Contacts:

The module Contacts is divided in two different tables: Customers and Suppliers.

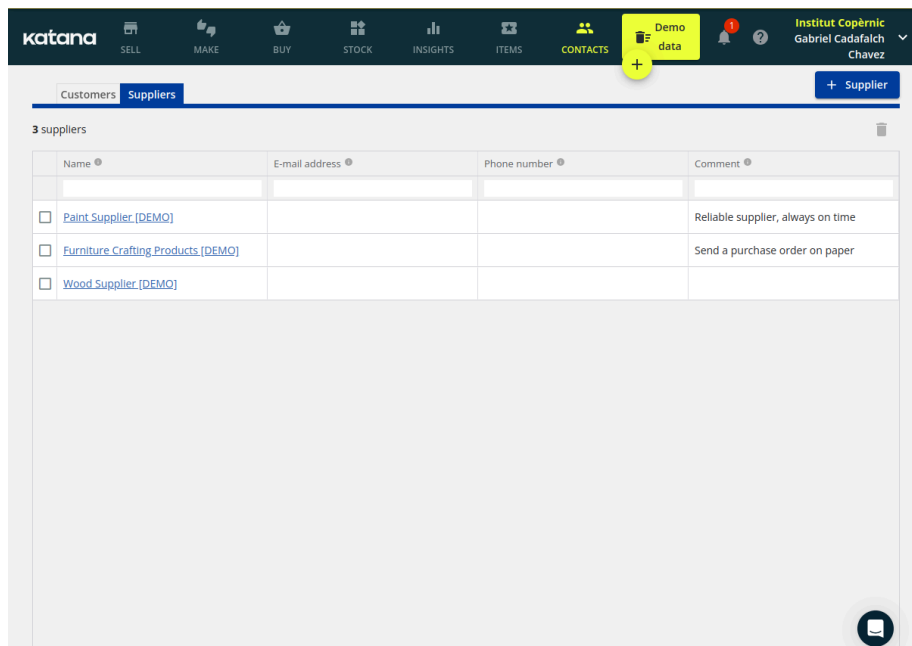
In the table 'Customers' is shown a table with these fields: Name, E-mail address, Currency, Phone number and Comments.



The screenshot shows the 'Customers' table in the Katana software. The table has 20 rows of customer data. The columns are: Name, E-mail address, Currency, Phone number, and Comment. A '+ Customer' button is visible in the top right corner of the table area.

	Name	E-mail address	Currency	Phone number	Comment
<input type="checkbox"/>	Jane Rooms [DEMO]	jane@rooms.com	USD		
<input type="checkbox"/>	Rob Decor [DEMO]	rob.decor@gmail.com	USD		
<input type="checkbox"/>	Jack Carpets [DEMO]	jack253@gmail.com	USD		
<input type="checkbox"/>	John Tabletop [DEMO]	john@tabletop.com	USD		
<input type="checkbox"/>	Mary Lights [DEMO]	mary.lights@gmail.com	USD		
<input type="checkbox"/>	O'Conner Furniture LLC [DEMO]	info@oconnerllc.com	USD		
<input type="checkbox"/>	Greg Bretland [DEMO]	gnbretlan@gmail.cn	USD		
<input type="checkbox"/>	Ledner and Sons Wholesale [DEMO]	orders@lednersons.com	USD		
<input type="checkbox"/>	Huel Interior Group [DEMO]	huel@huelgroup.com	USD		
<input type="checkbox"/>	Louie Rosie [DEMO]	lrosie2j@2shared.com	USD		
<input type="checkbox"/>	Roberts Kitchens [DEMO]	contact@r-kitchens.com	USD		
<input type="checkbox"/>	Pepe Bailham [DEMO]	pbailham0@php.net	USD		
<input type="checkbox"/>	Trey Dominick [DEMO]	tdominica@372.com	USD		
<input type="checkbox"/>	Stokes Inc. Measstore [DEMO]	stokes@aon.com	USD		

The Suppliers table is basically the same field but without the currency field.



The screenshot shows the 'Suppliers' table in the Katana software. The table has 3 rows of supplier data. The columns are: Name, E-mail address, Phone number, and Comment. A '+ Supplier' button is visible in the top right corner of the table area.

	Name	E-mail address	Phone number	Comment
<input type="checkbox"/>	Paint Supplier [DEMO]			Reliable supplier, always on time
<input type="checkbox"/>	Furniture Crafting Products [DEMO]			Send a purchase order on paper
<input type="checkbox"/>	Wood Supplier [DEMO]			

And in both views there is a button to add a new Customer or Supplier Respectively.

5. 3 ERP Tryton investigated (Alex García)

ERP Name	Tryton
URL	https://www.tryton.org/
Development company	Tryton Foundation
Launch date	2008
Development country	Belgium
Licence	GNU
Platforms	All
Online	Yes
Actual version	7.0
Development language	Python
Technical requirements	O.S Database Server Python Libraries Web browser
CRM included	Yes
Free	Yes

5.3.1 Functionalities

- **Customer and Supplier Management:** Allows you to manage customer and supplier information, including contacts, transaction histories, invoicing information, etc.
- **Inventory Management:** Facilitates tracking and control of inventory levels, warehouse management, stock control, among others.
- **Sales and Purchasing Management:** Helps in the management of sales orders, quotations, invoicing, purchase orders, payment tracking, etc.
- **Accounting:** Includes accounting functionalities such as account management, accounting entries, bank reconciliations, financial reports, etc.
- **Project Management:** Allows planning, monitoring and control of projects, resource allocation, cost tracking, among others.
- **Production Management:** Helps in the planning and control of production, management of production orders, quality control, process monitoring, etc.
- **Human Resources Management:** Functionalities to manage employee information, payroll, absences, evaluations, among other aspects related to human resources.

- **CRM (Customer Relationship Management):** Allows the management of sales opportunities, customer tracking, interaction history, etc.
- **Personalisation and Adaptability:** Tryton is highly configurable and allows its functionalities to be adapted to the specific needs of each company.
- **Security and Access Control:** Provides options to control user access, roles and permissions to maintain data security.

5.3.2 Characteristics

- It is open source with GNU license
- Is multiplatform
- Has an intuitive user interface.
- Security
- Technical support
- You can manage the modules

5.3.3 Demo screens

Layout

To begin with we have a fairly simple interface, as the only thing that shows us the modules on the left side.



Users

We can see all the users, and the money they have spent or are in debt.

Tryton

Acción

Terceros

×

Demo Spanish [USD]

Terceros

Terceros

Con compras

Con ventas

Direcciones

Métodos de contacto

Árbol de categorías

Productos

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Proyectos

Terceros

_14

+

FILTROS

Buscar

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	Código	Nombre	Identificador de impuesto	Por cobrar hoy	Por pagar hoy
	12	Dwight Schrute		0.00 USD	0.00 USD
	1	Electric City Trolley Museum As...		368.65 USD	0.00 USD
	11	Jim Halper		0.00 USD	0.00 USD
	6	Michael Scott		0.00 USD	0.00 USD
	5	Michael Scott Paper Company		0.00 USD	0.00 USD
	7	Pam Beesly		0.00 USD	0.00 USD
	8	Ryan Howard		0.00 USD	0.00 USD
	4	Saber		0.00 USD	-10,340.00 USD

We can add a new user, in the + button:

Tryton

Acción

Terceros

Demo Spanish [USD]

Terceros

Terceros

Con compras

Con ventas

Direcciones

Métodos de contacto

Árbol de categorías

Productos

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Proyectos

Terceros

1/16

Nombre: Alex

Código:

Activo: ☒

General

Proveedor

Identificadores

Banca

Contabilidad

Logística

Venta

Direcciones

1/1

Nombre del tercero: blablabla

Activo: ☐ Factura: ☐ Envío: ☐ Secuen

Nombre del edificio: blablabla

Calle:

We can also look at more information about the users, such as their address.

Trylon

Acción

Terceros

Terceros con ventas

Métodos de contacto

Direcciones

Demo Spanish [USD]

Terceros

Terceros

Con compras

Con ventas

Direcciones

Métodos de contacto

Árbol de categorías

Productos

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Proyectos

Terceros / Direcciones

16

FILTROS

Buscar

	Nombre del tercero	Nombre del edificio	Calle	Código Postal	Ciudad
<input type="checkbox"/>	Tercero				
<input type="checkbox"/>	Dunder Mifflin inc				
<input type="checkbox"/>	Dunder Mifflin inc				New York
<input type="checkbox"/>	Dunder Mifflin Scranton				Scranton
<input type="checkbox"/>	Dunder Mifflin Scranton				Scranton
<input type="checkbox"/>	Dwight Schrute				
<input type="checkbox"/>	Electric City Trolley Museu...		300 Cliff Street	18503	Scranton
<input type="checkbox"/>	Jim Halpert				

And their contact.

Trylon

Acción

Terceros

Terceros con ventas

Métodos de contacto

Direcciones

Demo Spanish [USD]

Terceros

Terceros

Con compras

Con ventas

Direcciones

Métodos de contacto

Árbol de categorías

Productos

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Proyectos

Terceros / Métodos de contacto

5

FILTROS

Buscar

	Tipo	Valor	Nombre	Tercero	Dirección
<input type="checkbox"/>	Teléfono	+1 570-348-3000		Albright Memorial Library	
<input type="checkbox"/>	Sitio Web	http://www.albright.org/		Albright Memorial Library	
<input type="checkbox"/>	Teléfono	+1 570-346-6883		Cooper's Seafood House	
<input type="checkbox"/>	Teléfono	+1 570-963-6590		Electric City Trolley Museum Associ...	
<input type="checkbox"/>	Sitio Web	http://www.ectma.org/		Electric City Trolley Museum Associ...	

Products

We can obtain a list of all registered products.

Tryton

Acción

Productos

Variantes

Proveedores

Árbol de categorías

Categorías

Demo Spanish [USD]

Terceros

Productos

Productos

Variantes

Proveedores

Árbol de categorías

Categorías

Informes

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Proyectos

Productos / Árbol de categorías / Categorías

FILTROS

Buscar

🔍

☆

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☰

☐ Nombre del registro

☐ Papers / A3

☐ Papers / A4

☐ Papers / A5

☐ Computers

☐ Papers / Ledger

☐ Papers / Legal

☐ Papers / Letter

☐ Papers

And also a list of all products with the units ordered and their cost.

Tryton

Acción

Productos

Demo Spanish [USD]

Terceros

Productos

Productos

Variantes

Proveedores

Árbol de categorías

Informes

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Proyectos

Productos

FILTROS

Buscar

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☆

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<div>☰</div> <div><input type="checkbox"/></div>	Código	Nombre	Precio de venta	Precio de costo	UdM por defecto	Tipo
<input type="checkbox"/>		A3 Paper 250	5.0500	2.5000	Unidad	Articulos
<input type="checkbox"/>		A3 Paper 500	10.2010	5.0000	Unidad	Articulos
<input type="checkbox"/>		A4 Paper 250	5.0500	2.5000	Unidad	Articulos
<input type="checkbox"/>		A4 Paper 500	10.2010	5.0000	Unidad	Articulos
<input type="checkbox"/>		A5 Paper 250	5.0500	2.5000	Unidad	Articulos
<input type="checkbox"/>		A5 Paper 500	10.2010	5.0000	Unidad	Articulos
<input type="checkbox"/>		Computer	750.0000	0.0000	Unidad	Articulos
<input type="checkbox"/>		Keyboard	30.0000	0.0000	Unidad	Articulos
<input type="checkbox"/>		Ledger Paper 250	5.0500	2.5000	Unidad	Articulos

Purchases

In the sales module we can see the user who has made a purchase and the date of the purchase:

The screenshot shows the Tryton Compras (Purchases) module interface. The left sidebar contains a navigation menu with options: Terceros, Productos, Banca, Contabilidad, Logística, Compras (selected), Informes, Ventas, Partes de trabajo, Producciones, and Proyectos. The main panel displays the 'Compras' header with a search bar and filters. The filters section shows: Borrador (1), Presupuesto (1), Confirmada (0), En proceso (5), Excepción (0), and Todo. Below the filters is a table with columns: Número, Referencia, Fecha de compra, Tercero, Base sin impuesto, Estado de la factura, and Estado de envío. The table contains one row with the following data: [X] in the checkbox column, an empty cell for Número, an empty cell for Referencia, 31/08/2023 for Fecha de compra, Saber for Tercero, 1,57... for Base sin impuesto, USD for Estado de la factura, and Ninguno for Estado de envío.

Sales

In the sales module we can see all the sales made, the date, the seller and the money obtained:

The screenshot shows the Tryton Ventas (Sales) module interface. The left sidebar contains a navigation menu with options: Terceros, Productos, Banca, Contabilidad, Logística, Compras, Ventas (selected), Informes, Partes de trabajo, Producciones, and Proyectos. The main panel displays the 'Ventas' header with a search bar and filters. The filters section shows: Borrador (19), Presupuesto (17), Confirmada (0), En proceso (34), Excepción (0), and Todo. Below the filters is a table with columns: Número, Fecha venta, Tercero, Base sin impuesto, Estado de la factura, and Estado de envío. The table contains eight rows of sales data:

Número	Fecha venta	Tercero	Base sin impuesto	Estado de la factura	Estado de envío
<input type="checkbox"/>	06/11/2023	Albright Memorial Library	654.88 USD	Ninguno	Ninguno
<input type="checkbox"/>	05/11/2023	Cooper's Seafood House	328.25 USD	Ninguno	Ninguno
<input type="checkbox"/>	03/11/2023	Electric City Trolley Museum Association	2,257... USD	Ninguno	Ninguno
<input type="checkbox"/>	31/10/2023	Albright Memorial Library	1,095... USD	Ninguno	Ninguno
<input type="checkbox"/>	25/10/2023	Albright Memorial Library	410.87 USD	Ninguno	Ninguno
<input type="checkbox"/>	19/10/2023	Electric City Trolley Museum Association	1,811... USD	Ninguno	Ninguno
<input type="checkbox"/>	12/10/2023	Cooper's Seafood House	510.05 USD	Ninguno	Ninguno

Parts of work

In the work reports module, we can see the reports and their employees, the date, the duration of the report and the type of task they have done.

Tryton

Acción

Lineas

Demo Spanish [USD]

Terceros

Productos

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Añadir parte de trabajo

Lineas

Informes

Producciones

Proyectos

Partes de trabajo / Líneas

J/234

FILTROS

Buscar

Empleado	Fecha	Duración	Trabajo	Descripción
<input type="checkbox"/> Ryan Howard	30/10/20...	04:00	Website\setup	
<input type="checkbox"/> Ryan Howard	30/10/20...	01:00	Website\setup	
<input type="checkbox"/> Michael Scott	30/10/20...	03:00	Website\design	
<input type="checkbox"/> Pam Beesly	27/10/20...	05:00	Marketing	
<input type="checkbox"/> Pam Beesly	27/10/20...	02:00	Secretary	
<input type="checkbox"/> Pam Beesly	27/10/20...	1d	Marketing	
<input type="checkbox"/> Pam Beesly	27/10/20...	03:00	Secretary	

Partes de trabajo / Líneas

1/235

FILTROS

Buscar

Empleado	Fecha	Duración	Trabajo	Descripción
<input checked="" type="checkbox"/>	20/11/20...			
<input type="checkbox"/> Ryan Howard	30/10/20...	03:00	Calendar\design	
<input type="checkbox"/> Ryan Howard	30/10/20...	05:00	Secretary	
<input type="checkbox"/> Ryan Howard	30/10/20...	04:00	Website\setup	
<input type="checkbox"/> Ryan Howard	30/10/20...	01:00	Website\setup	
<input type="checkbox"/> Michael Scott	30/10/20...	03:00	Website\design	
<input type="checkbox"/> Pam Beesly	27/10/20...	05:00	Marketing	

Productions

In the production module we can see the products that have been produced and also their units.

Tryton

Acción

Producciones

Terceros

Productos

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Trabajos

Producciones

Proyectos

☆

☆

☆

Producciones -

FILTROS

Buscar

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Solicitudes

0

Borrador

10

En espera

1

Reservado parcialmente

0

Reservado

0

En ejecución

☰

☐

Número

Producto

Cantidad

Fecha inicio
estimada

Fecha
estimada

☐

17

Computer

40 u

☐

18

Computer

33 u

☐

19

Computer

34 u

☐

20

Computer

25 u

☐

21

Computer

20 u

☐

22

Computer

22 u

☐

23

Computer

27 u

In addition to the products, we can also see logs of the production work.

Tryton

Acción

Producciones

Trabajos

Terceros

Productos

Banca

Contabilidad

Logística

Compras

Ventas

Partes de trabajo

Producciones

Trabajos

Producciones

Proyectos

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Producciones / Trabajos -

FILTROS

Buscar

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Solicitud

4

Borrador

24

En espera

0

En ejecución

0

Todo

☰

☐

Producción

Operación

Centro de trabajo

☐

27

Assemble pieces

Line 3 / Assembly Line 3

☐

27

Install software

Line 3 / Installation Line 3

☐

27

Test

Line 3 / Installation Line 3

☐

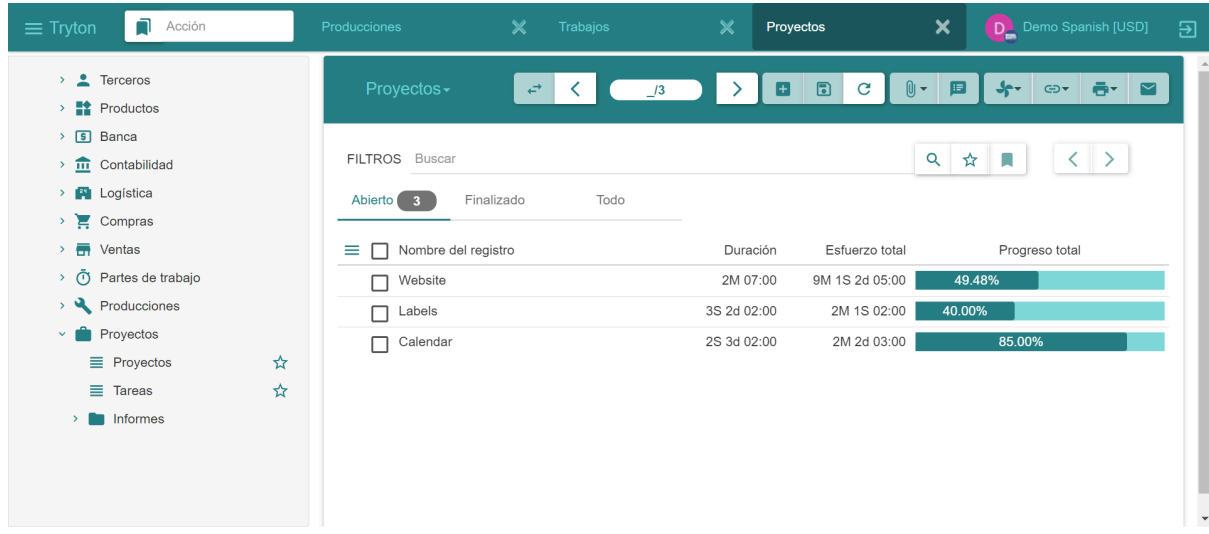
27

Package

Line 3 / Packaging Line 3

Projects

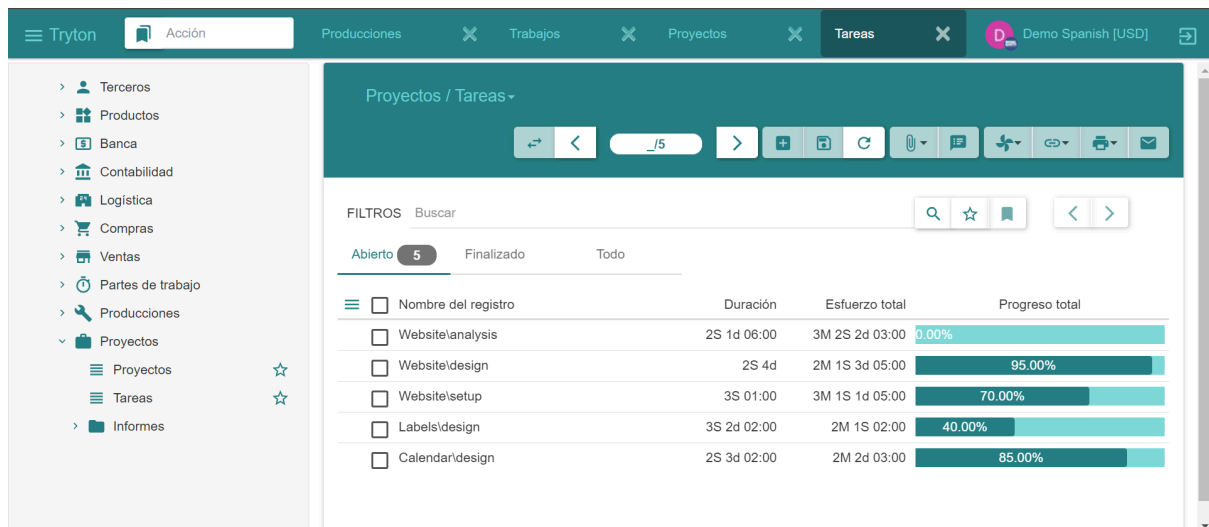
In the projects module we can see all the projects started, their duration, the time spent on the project and the total progress of the project.



The screenshot shows the 'Proyectos' module interface. The sidebar on the left contains a list of modules: Terceros, Productos, Banca, Contabilidad, Logística, Compras, Ventas, Partes de trabajo, Producciones, and Proyectos (selected). The main panel displays a table of projects with columns for 'Nombre del registro', 'Duración', 'Esfuerzo total', and 'Progreso total'. The table shows three projects: Website, Labels, and Calendar, each with a progress bar indicating its completion status.

Nombre del registro	Duración	Esfuerzo total	Progreso total
Website	2M 07:00	9M 1S 2d 05:00	49.48%
Labels	3S 2d 02:00	2M 1S 02:00	40.00%
Calendar	2S 3d 02:00	2M 2d 03:00	85.00%

The module also contains a section to view tasks and their progress.



The screenshot shows the 'Tareas' module interface. The sidebar on the left contains a list of modules: Terceros, Productos, Banca, Contabilidad, Logística, Compras, Ventas, Partes de trabajo, Producciones, and Proyectos (selected). The main panel displays a table of tasks with columns for 'Nombre del registro', 'Duración', 'Esfuerzo total', and 'Progreso total'. The table shows five tasks: Website/analysis, Website/design, Website/setup, Labels/design, and Calendar/design, each with a progress bar indicating its completion status.

Nombre del registro	Duración	Esfuerzo total	Progreso total
Website/analysis	2S 1d 06:00	3M 2S 2d 03:00	0.00%
Website/design	2S 4d	2M 1S 3d 05:00	95.00%
Website/setup	3S 01:00	3M 1S 1d 05:00	70.00%
Labels/design	3S 2d 02:00	2M 1S 02:00	40.00%
Calendar/design	2S 3d 02:00	2M 2d 03:00	85.00%

Non-functional requirements

RN01: It must be functional with any web browser

RN02: Interface with HTML5 + CSS/Bootstrap

RN03: Database with MySQL

RN04: Manage HTTP request and response with SpringBoot

RN05: The code must be clear

RN06: Language interface (Multi Language)

Functional requirements

User Management

RF01: Register:

The user can register in the ERP.

RF02: Login:

The user can login into the ERP with her respective role.

RF03: Delete user

Delete from the ERP completely.

RF04: View alumni list

Obtains a list with all the alumni.

RF05: Select user

Read's user profile.

RF06: Filters

Filter the list by degree.

RF07: Search user by nom/surname

A search bar to search for concrete alumni.

RF08: Order by parameter

Order the list by marks, etc.

Profile Management

RF09: Edit user profile

Can edit the user info.

RF10: Edit alumni mark

Allows to modify the alumni mark.

Forum Management

RF11: Create forum post

Creates a post in the forum.

RF12: Delete post

Delete a post from the forum.

RF13 Edit post

Allows to edit a post.

RF14: View posts

You get a view of all the posts.

RF15: Select post

Enter to a post.

RF16: Post search

A post can be searched by username.

Announcement Management

RF17: Send emails

An email is sent to all users.

Role management

RF18: List roles

Obtains a list of all the roles.

RF19: Check/uncheck roles to users

Giving/removing a user's role.

RF20: Check/uncheck roles to modules

Gives permission to access the modules.

Stats Module

RF21: Stats

Obtain a bar chart with the percentage of alumni currently working.

Actors

Alumni
It's the "ex-student". Can edit some of their information and make posts.
RF01 RF02 RF09 RF11 RF12 RF13 RF14 RF15 RF16

Head master
It's the "head of studies". Can do almost anything.
RF01 RF02 RF03 RF04 RF05 RF06 RF07 RF08 RF09 RF10 RF11 RF12 RF13 RF14 RF15 RF16 RF21

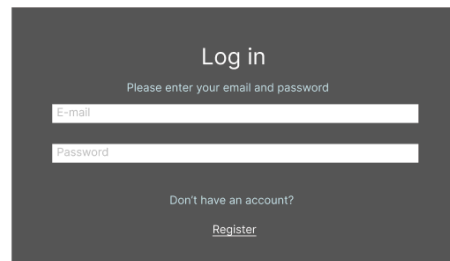
Admin
Can do everything.
RF01 RF02 RF03

RF04
RF05
RF06
RF07
RF08
RF09
RF10
RF11
RF12
RF13
RF14
RF15
RF16
RF17
RF18
RF19
RF20
RF21

Mockups

On startup, a basic login will appear asking for the user's email address and password. In case the user does not have an account, he/she will be able to register.

COPERNIC ALUMNI



Log in

Please enter your email and password

E-mail

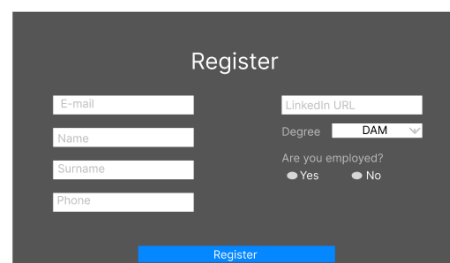
Password

Don't have an account?

[Register](#)

In the registration form, the user will be asked for their email address, their name, surname, telephone number, their linkedin, their studies and their current employment status.

COPERNIC ALUMNI



Register

E-mail

Name

Surname

Phone

LinkedIn URL

Degree **DAM**

Are you employed?

☒ Yes ☐ No

[Register](#)

This is the main menu, where we will simply see the modules on the left side. And at the top, we will see the name of the user, where if we click we will be able to go to our profile.

COPERNIC ALUMNI

Admin

Alumni

Forum

Announcements

Role Management

In the Alumni module, you can see a list of all alumni. If the user has permissions, it will be able to delete records. It is also possible to sort by mark or filter by study.

COPERNIC ALUMNI

Admin



Alumni




Forum

Announcements

Role Management

Alumni

Filter by degree  Order by mark 

Name	Surname	Email	Phone	Linkedin	Degree	Mark	Delete
name1	surname1	name@gmail.com	11111111	name.linkedin.com	DAM	8	
name1	surname1	name@gmail.com	11111111	name.linkedin.com	DAW	8	
name1	surname1	name@gmail.com	11111111	name.linkedin.com	ASIX	7	

If clicked a register, you will be able to view its profile in a more comprehensive way. If the user has permissions, he will be able to edit some fields.

COPERNIC ALUMNI

Admin

Alumni

Forum

Announcements

Role Management

Alumni

name1 surname1

e-mail: name1@gmail.com

Phone: 11111111

LinkedIn: name1/linkedin.com

Degree: DAM

Mark: 8

Employed: Yes

In the forum module, we will see all the posts created with their title and author, where clicking will show the post.

If the user has permissions, he/she can delete the post.

In the "create post" button you can create a post as its name indicates, and you can also search for a post using the search bar.

COPERNIC ALUMNI

Admin

Alumni


Forum


Announcements

Role Management

Forum

Create post

My first post - user1 

My experience after the degree - user2 

To create a post, all you have to do is enter the title, the content, and hit the send post button.

COPERNIC ALUMNI

Admin

Alumni

Forum

Announcements

Role Management

Forum

Send post

If we click on a post, we will be able to see all its content:

COPERNIC ALUMNI

Admin

Alumni

Forum

Announcements

Role Management

Forum

My first post

user1

"On the other hand, we denounce with righteous indignation and dislike men who are so beguiled and demoralized by the charms of pleasure of the moment, so blinded by desire, that they cannot foresee the pain and trouble that are bound to ensue; and equal blame belongs to those who fail in their duty through weakness of will, which is the same as saying through shrinking from toil and pain. These cases are perfectly simple and easy to distinguish. In a free hour, when our power of choice is untrammelled and when nothing prevents our being able to do what we like best, every pleasure is to be welcomed and every pain avoided. But in certain circumstances and owing to the claims of duty or the obligations of business it will frequently occur that pleasures have to be repudiated and annoyances accepted. The wise man therefore always holds in these matters to this principle of selection: he rejects pleasures to secure other greater pleasures, or else he endures pains to avoid worse pains."

In the announcement module, the head master can automatically send an email to all alumni.

COPERNIC ALUMNI

Admin

Alumni

Forum

Announcements

Role Management

Announcements

Send e-mail

In the role manager, the administrator can assign a role to a user, and assign access to each role for the modules.

COPERNIC ALUMNIAdmin

Alumni

Forum

Announcements

Role Management

Role Management

	Alumni	Head studies	Admin
Name1 Surname1			V
Name2 Surname2	V		
Name2 Surname2	V		
Name2 Surname2	V		
Name3 Surname3		V	

Module Access

	Alumni	Head studies	Admin
Alumni List		V	V
Forum	V	V	V
Announcement		V	V
Role Management			V

In the user profile, the user's information can be edited.

COPERNIC ALUMNIAdmin

Alumni

Forum

Announcements

Role Management

User profile

Name

Surname

e-mail

Phone

LinkedIn

Degree: DAM

Employed: ☒ Yes ☐ No

Save changes

In the statistics module, the headmaster will be able to obtain a graph with the percentage of job placement for each study.

COPERNIC ALUMNIAdmin

Alumni

Forum

Announcements

Role Management

Stats

Stats

Job placement

DAM

ASIX

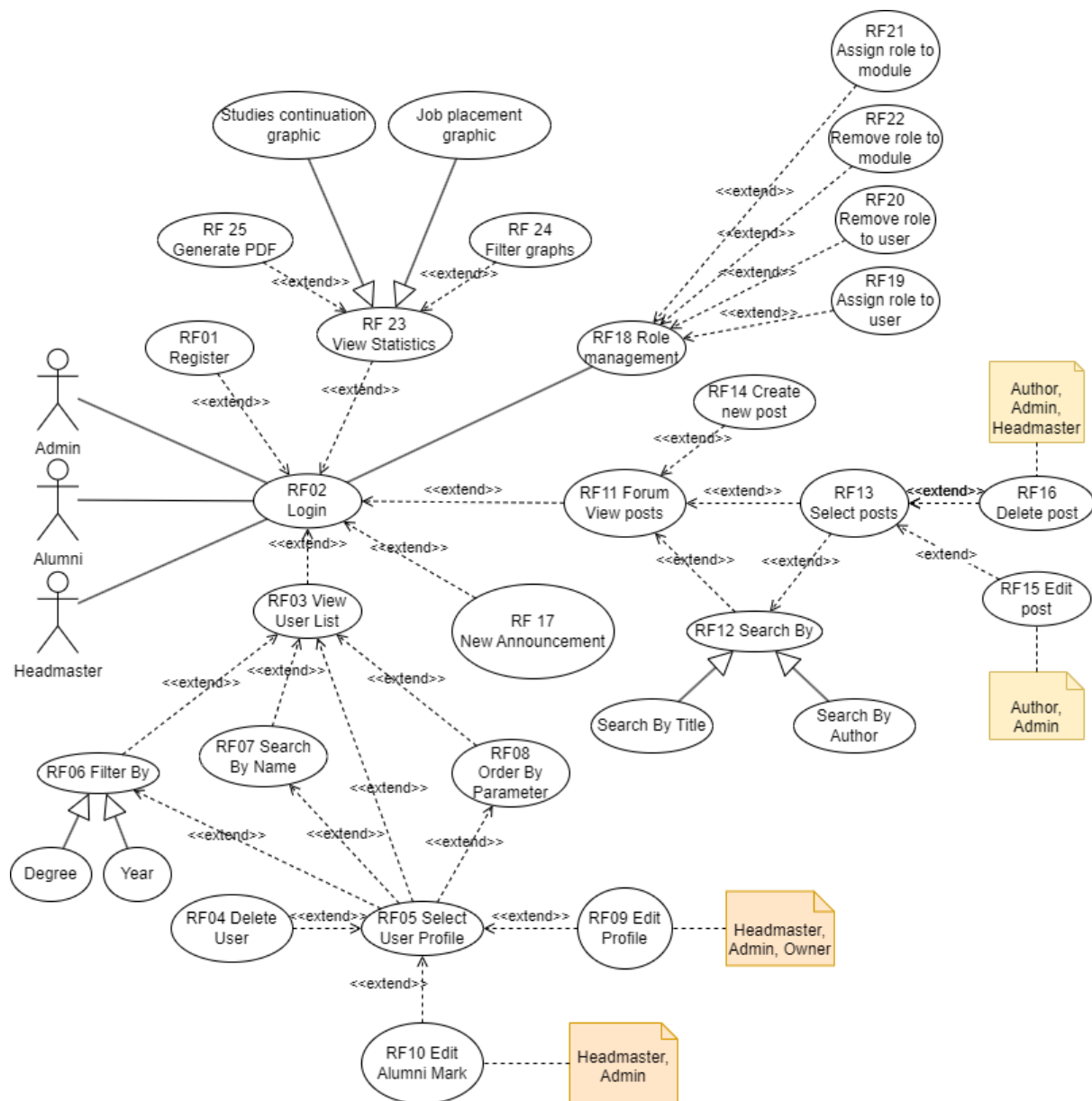
DAW

Planning of the implementation cost

Functionality	Cost
RF01	M
RF02	S
RF03	S
RF04	S
RF05	S
RF06	M
RF07	M
RF08	M
RF09	M
RF10	M
RF11	M
RF12	M
RF13	M
RF14	M
RF15	S
RF16	M
RF17	L
RF18	S
RF19	L
RF20	L
RF21	M

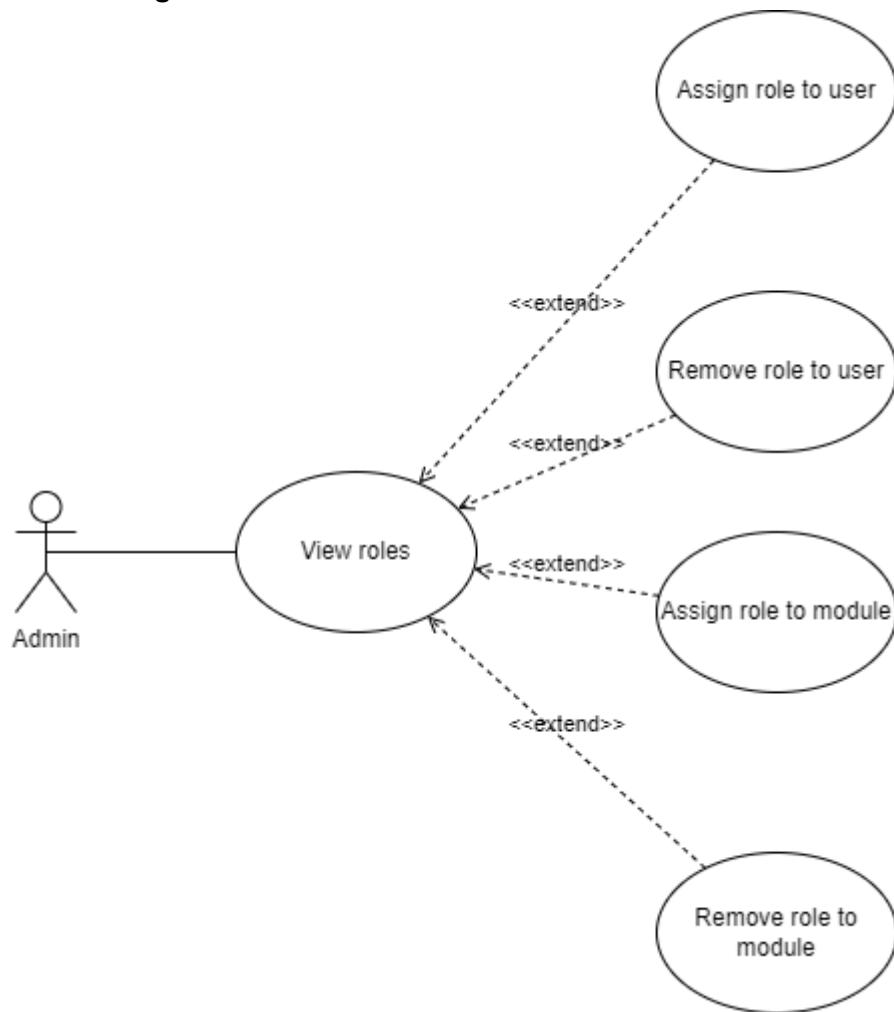
Diagram case

Global

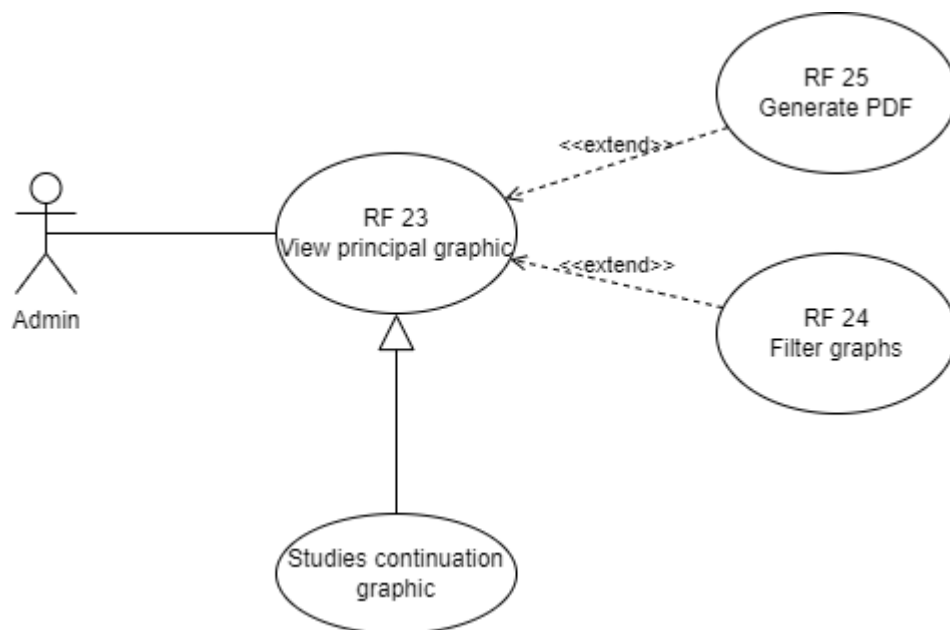


By modules

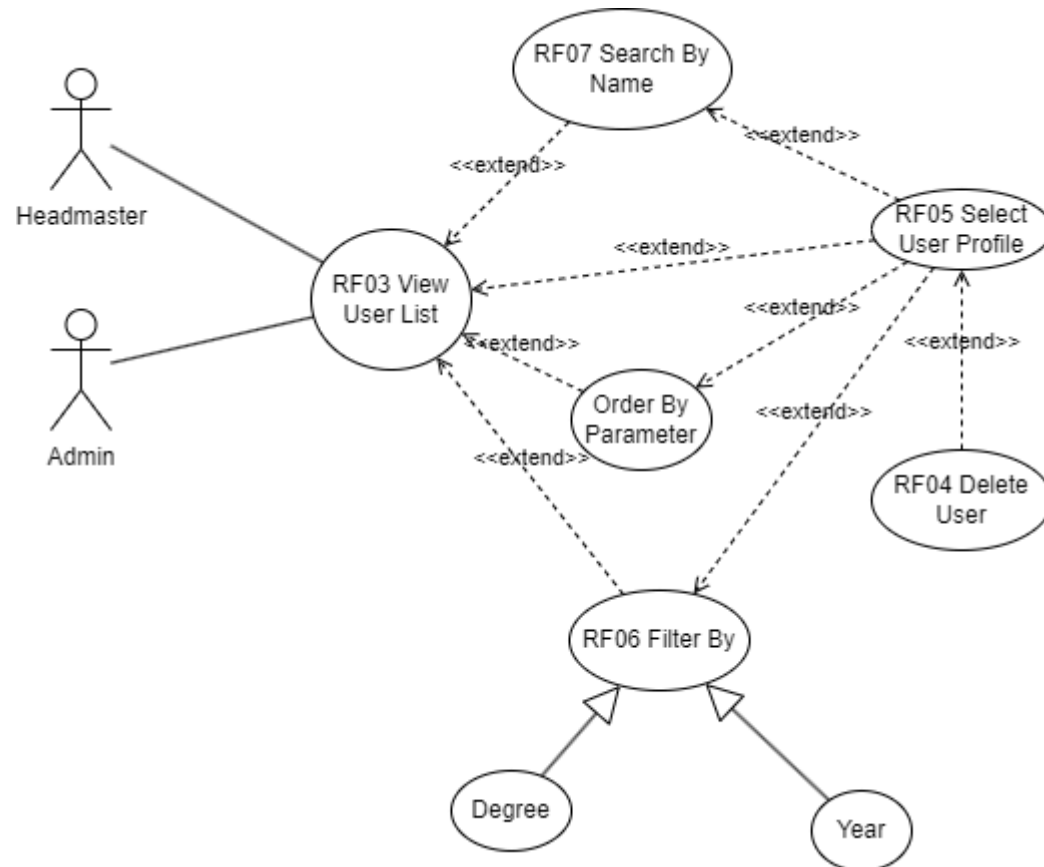
Role Management



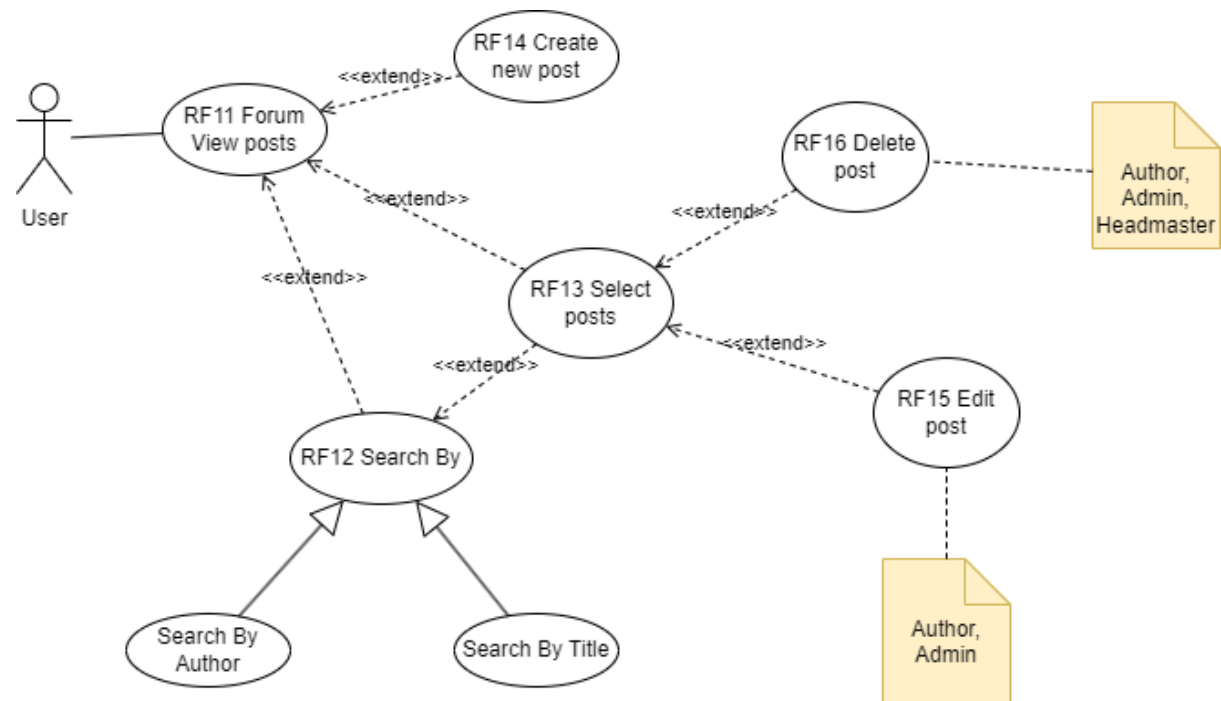
Stats Module



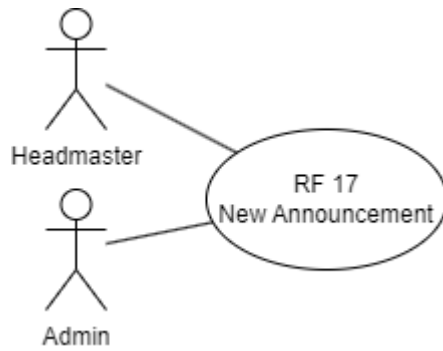
Alumni Module



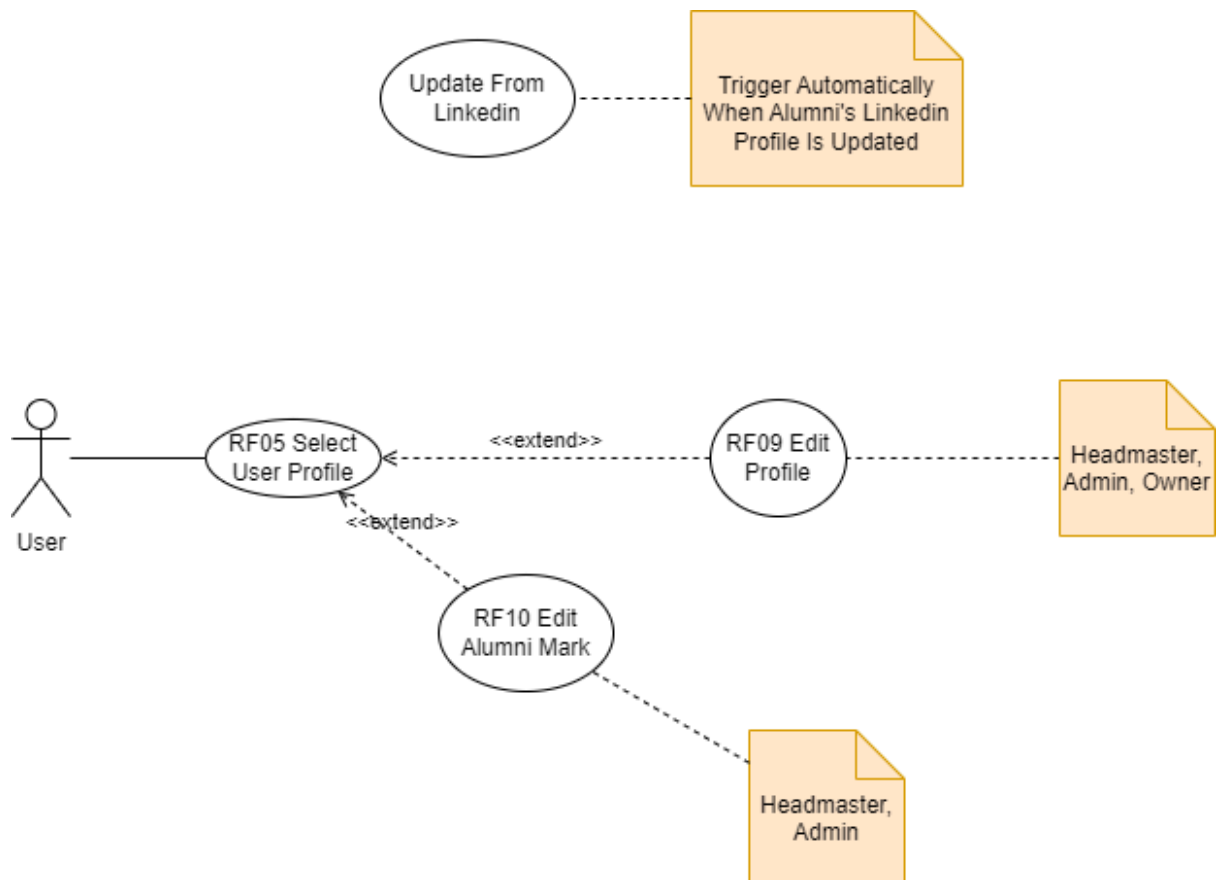
Forum Module



Communications Module



User Profile



Requirement Detail

ALUMNI MANAGEMENT MODULE

RF01	Register	
Description:	Allows the user to register a private account into the platform linking it to the corporate account of the LDAP	
Actors:	Student	
Pre:	Having tried to login with corporate account on function RF02	
Normal Flow		Alternative Flow
1. Enter the required input. 2. The system validates the credentials with the LDAP. 3. The user is created.		1. If the input is not valid, it should notify the user. 1.1 If the imputed e-mail is not a personal address, it should notify the user.
Post:	The user is redirected to RF02	

RF02	Login	
Description:	Allows the platform to check if the user is registered on the LDAP with a corporate account, and to login into the platform with the private account	
Actors:	All users	
Pre:	Having a corporate account registered on the authentication server "Ldap" or an account created with the private account	
Normal Flow		Alternative Flow
1. Enter the email and the password. 2. The system validates the credentials. If it's a personal address, it will check if it's registered under any user and allow the user to enter the application.		1.1. If the input is not a valid email or password, it should notify the user. 2.1. If the imputed mail is a corporate mail, it will check if it's registered on the LDAP. 2.1.1. If it's an already registered mail, the user will be asked to use a valid address. 2.1.2. If it's not a registered mail, it will jump to RF01.
Post:	The user enters into the platform	

RF03	View Student	
Description:	Shows a table with all the alumni	
Actors:	Headmaster and Admin	
Pre:	Be logged as headmaster or admin	
Normal Flow		Alternative Flow
1. Enter into the alumni module.		
Post:	Views all the alumni	

RF04	Delete user	
Description:	Allows to delete a user from the database	
Actors:	Headmaster, Admin	
Pre:	Be logged as a headmaster or admin. The user should be on RF03	
Normal Flow		Alternative Flow
1. Select an alumni from the list. 2. Click on the delete button. 3. Click the 'continue' button. 4. The user would be deleted.		3.1 Click cancel button and return to step 1.
Post:	Show the user list RF03 without the deleted user	

RF05	Select user (Read user's profile)	
Description:	Shows the profile of the selected user	
Actors:	Headmaster and Admin	
Pre:	Be logged as a headmaster or admin. The user should be on RF03	
Normal Flow		Alternative Flow
1. Click on the selected user to see it's profile		
Post:	Show on screen the information of the selected user	

RF06	Filters (Degree, Mark, Curs, etc.)	
Description:	Filters the list of RF04 by the selected filter	
Actors:	Headmaster and Admin	
Pre:	RF04 View Student	
Normal Flow		Alternative Flow
1. Click on filter the alumni 2. Select the filter (Degree, Mark, ...)		1.1 Don't select anything and just view all the alumni
Post:	Views the alumni that pass the selected filter	

RF07	Search user by name/surname	
Description:	Tool to search for a specific user	
Actors:	Headmaster and Admin	
Pre:	RF04 View Student	
Normal Flow		Alternative Flow
1. Write the name or surname of the user to be searched. 2. It finds the searched user/s in the database.		2.1 It doesn't find the searched user in the database.
Post:	Shows in the screen the result of the search	

RF08	Order by parameter	
Description:	Tool to order the list to see better	
Actors:	Headmaster, Admin	
Pre:	RF04 View Student	
Normal Flow		Alternative Flow
1. Select the parameter for order.		
Post:	Shows the alumni ordered by the selected parameter	

PROFILE MANAGEMENT MODULE

RF09	Edit user profile	
Description:	The user can edit his own profile	
Actors:	All users	
Pre:	RF05 Select User Profile	
Normal Flow		Alternative Flow
1. Change the fields that the editor wants 2. Check if the edited fields are in the correct format 3. Commit the changes		1.1 Cancel Button and return to RF05
Post:	Shows the User Profile with the updated fields	

RF10	Edit alumni average grade	
Description:	Allows to enter the average grade of the alumni	
Actors:	Headmaster, Admin	
Pre:	Have selected an alumni	
Normal Flow		Alternative Flow
1. Enter the average grade		
Post:	The profile now shows the average grade of the degree	

FORUM MANAGEMENT MODULE

RF11	View Forum
Description:	The user visualizes the forum
Actors:	All users
Pre:	The user has been logged in
Normal Flow	Alternative Flow
1. Left-click on the Forum button.	
Post:	The forum will be loaded and if there are posts, they will be shown

RF12	Search Post
Description:	Allows the user to search a post by it's data
Actors:	All users
Pre:	The user must be logged in, and in RF11
Normal Flow	Alternative Flow
1. Write the desired input on the search bar. 2. Press enter to begin the search. 3. The system will search matches with the desired input. 4. It will show the posts containing the desired input.	3.1. If there are no matches, the search result will be shown as empty, with the message "not found" showing.
Post:	The displayed posts will be selectable

RF13	Select Post (read)
Description:	The user will be able of select a post for its read, modification or deletion
Actors:	All users
Pre:	The user must be logged in, and in RF11
Normal Flow	Alternative Flow
1. Left-click on the desired post.	
Post:	The post opens

RF14	Create Post	
Description:	Allows the user to create a new post	
Actors:	All users	
Pre:	The user must be logged in, and in RF11	
Normal Flow		Alternative Flow
1. Click on the "Create New Post" button. 2. Add a title for the post (max 40 chr). 3. Add the body of the post. (max 400 chr) 4. Press the "Post" button to post the post.		4.1. The post will not post if the title or body of the post is empty.
Post:	The user will return to the Forum RF11, showing the last post posted	

RF15	Edit Post	
Description:	Allows the user do modify a existing post	
Actors:	All users	
Pre:	The user must be logged in as the author of the post or an administrator role. The user must have selected a post RF13	
Normal Flow		Alternative Flow
1. The user must click the edit post button. 2. Edit any of the data to change. 3. Left-click on "save changes" to save the edited post.		1. Canceling this action will change nothing on the post. 3. If the user doesn't edit anything, the post will not change.
Post:	The user returns to the selected post, now edited	

RF16	Delete Post	
Description:	Allows the user to delete an existing post	
Actors:	All users	
Pre:	The user must be logged in as the author of the post or an administrator role. The user must have selected a post RF13	
Normal Flow		Alternative Flow
1. Press on "save changes" to save the edited post.		1. Canceling this action will change nothing on the post. 2. If the user doesn't edit anything, the post will not change.
Post:	The post would be deleted	

ANNOUNCEMENTS MODULE

RF17	New Announcement	
Description:	Allows the headmaster to send messages to all the registered students on the platform	
Actors:	Headmaster	
Pre:	Be logged in as Headmaster	
Normal Flow		Alternative Flow
1. Left-click on the Announcements button. 2. Select a title for the message. 3. Write the body of the message. 4. Press the “send the message” button.		1.2. Clicking on any other button will delete the message.
Post:	The message will be send to all registered students	

ROLE MANAGEMENT MODULE

RF18	View roles	
Description:	The administrator can manage the roles of the users and modules	
Actors:	Administrator	
Pre:	Be logged as admin	
Regular Flow		Alternative Flow
1. Left-click on the Roles button.		
Post:	Visualizes the roles management module	

RF19	Assign role to user	
Description:	The administrator can remove roles from users	
Actors:	Administrator	
Pre:	Be logged as admin	
Regular Flow		Alternative Flow
1. Selects the desired user. 2. Check the user with the corresponding role.		
Post:	Updates the user with the desired role	

RF20	Remove role to user	
Description:	The administrator can assign roles to users	
Actors:	Administrator	
Pre:	Be logged as admin	
Regular Flow		Alternative Flow
1. Selects the desired user. 2. Uncheck the user with the corresponding role.		
Post:	Updates the user with the desired role	

RF21	Assign role to module	
Description:	Give access permissions from a role to a module	
Actors:	Administrator	
Pre:	Be logged as admin	
Regular Flow		Alternative Flow
1. Enter into the roles module. 2. Check a module with the corresponding role.		
Post:	Updates the module with the desired role	

RF22	Remove role to module	
Description:	Remove access permissions from a role to a module	
Actors:	Administrator	
Pre:	Be logged as admin	
Regular Flow		Alternative Flow
1. Enter into the roles module. 2. Uncheck a module of the corresponding role.		
Post:	Updates the module without the desired role	

STATISTICS MODULE

RF23	View graphics	
Description:	The headmaster can enter the statistics module	
Actors:	Headmaster	
Pre:	Be logged as a headmaster	
Normal Flow		Alternative Flow
1. Enter the stats module.		
Post:	All the graphs and statistics are shown	

RF24	Filter graphs	
Description:	The headmaster can filter by determined options	
Actors:	Headmaster	
Pre:	Have entered the View Graphics (RF23)	
Normal Flow		Alternative Flow
1. Click on one of the options.		
Post:	The filtered graph is shown	

RF25	Generate PDF	
Description:	The headmaster can generate a PDF of the graphic	
Actors:	Headmaster	
Pre:	Have entered the View Graphics (RF23)	
Normal Flow:		Alternative Flow:
1. Click on the generate PDF button. 2. A PDF file will be created and downloaded.		2. User cancels the download. 2.1. User shall restart the download.
Post:	Obtains the PDF	

Navigations Screens

Admin:

<https://www.figma.com/proto/S5Gh5D0VYwVfuC30itvghs/ERP-Alumni?type=design&node-id=0-1&t=olQdKlp4lKAvdK0l-0&scaling=min-zoom&starting-point-node-id=56%3A1340&show-proto-sidebar=1>

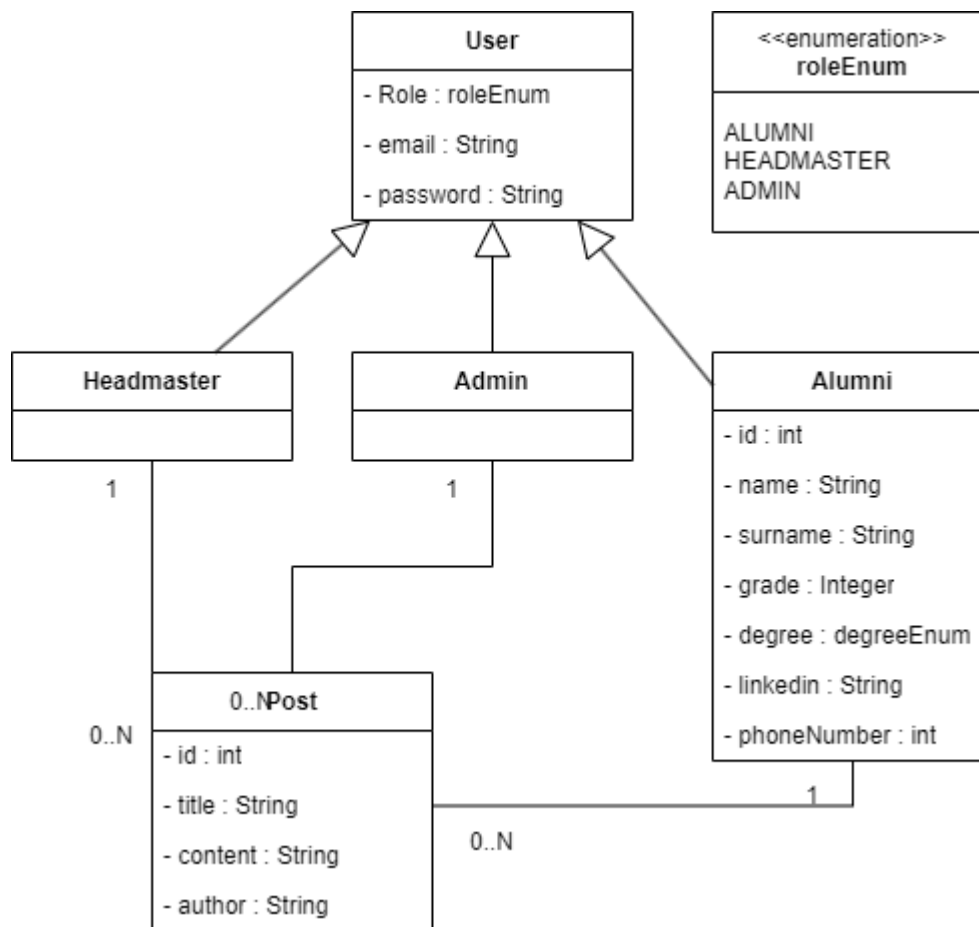
Headmaster:

<https://www.figma.com/proto/S5Gh5D0VYwVfuC30itvghs/ERP-Alumni?type=design&node-id=0-1&t=olQdKlp4lKAvdK0l-0&scaling=min-zoom&starting-point-node-id=46%3A361&show-proto-sidebar=1>

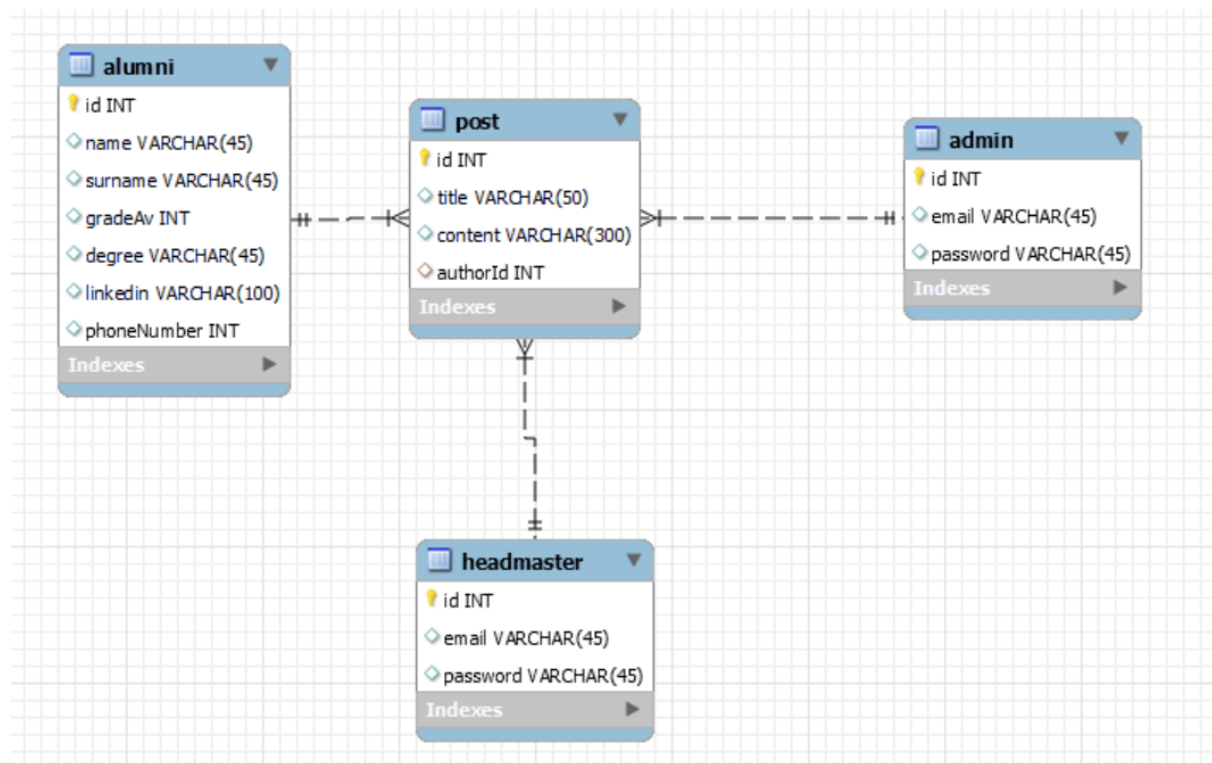
Alumni:

<https://www.figma.com/proto/S5Gh5D0VYwVfuC30itvghs/ERP-Alumni?type=design&node-id=0-1&t=olQdKlp4lKAvdK0l-0&scaling=min-zoom&starting-point-node-id=52%3A604&show-proto-sidebar=1>

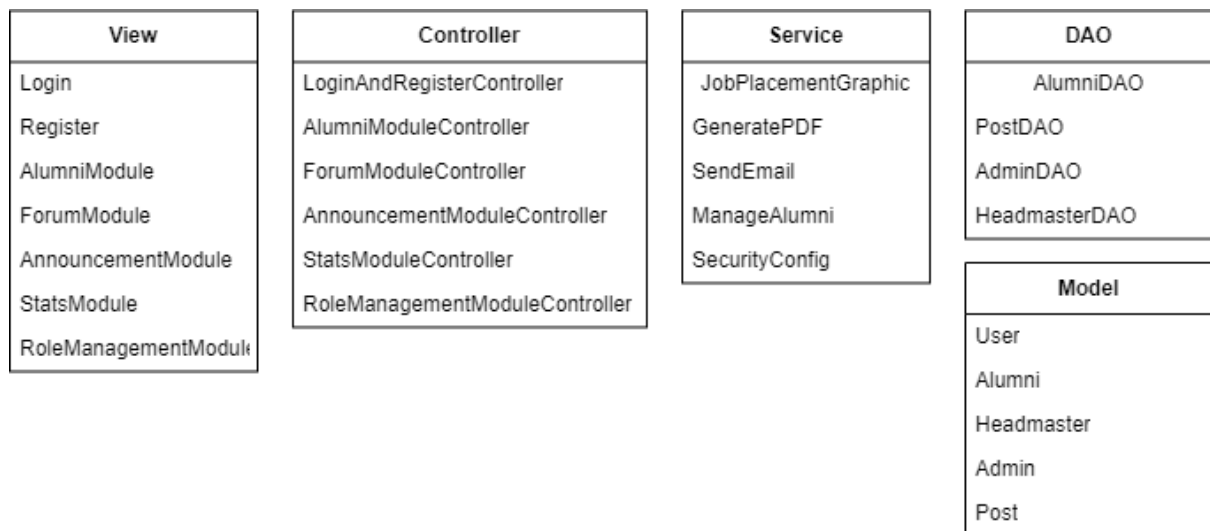
Class Diagram



Database Model



Architecture Diagram



Sprint 1

▼ Tablero Sprint 1 18 dic - 19 ene (14 incidencias)				41	30	0	Completar sprint	...
GRUP-9 RF09: Edit user profile	ALUMNI LIST MODULE	TAREAS POR HACER	3					
GRUP-32 Tancar sessio		TAREAS POR HACER	5					
GRUP-31 Visualitzar dashboard amb menu		EN CURSO	6					
GRUP-2 RF02: Login		EN CURSO	8					
GRUP-14 RF14: View posts	FORUM MODULE	TAREAS POR HACER	6					
GRUP-11 RF11: Create forum post	FORUM MODULE	TAREAS POR HACER	3					
GRUP-15 RF15: Select post	FORUM MODULE	TAREAS POR HACER	6					
GRUP-12 RF12: Delete post	FORUM MODULE	TAREAS POR HACER	3					
GRUP-13 RF13 Edit post	FORUM MODULE	TAREAS POR HACER	2					
GRUP-5 RF05: Select user (Read user's profile)	ALUMNI LIST MODULE	TAREAS POR HACER	10					
GRUP-3 RF03: Delete user	ALUMNI LIST MODULE	TAREAS POR HACER	3					
GRUP-37 Create sql planing	ALUMNI LIST MODULE	EN REVISIÓN	2					
GRUP-1 RF01: Register		EN REVISIÓN	8					
GRUP-4 RF04: View alumni list	ALUMNI LIST MODULE	EN REVISIÓN						

Sprints

GRUP-26 ALUMNI LIST MODULE

GRUP-27 FORUM MODULE

GRUP-28 ANNOUNCEMENTS MODULE

GRUP-29 STATS MODULE

GRUP-30 ROLE MANAGEMENT MODULE

+ Crear Epic

Hoy

Semanas

Meses

Trimestres

GRUP-26

Incidencias secundarias

Ordenar por

0 % hecho

GRUP-9 RF09: Edit user profile

3

TAREAS POR HACER

GRUP-5 RF05: Select user (Read user's p...

10

TAREAS POR HACER

GRUP-3 RF03: Delete user

3

TAREAS POR HACER

GRUP-6 RF06: Filters

4

TAREAS POR HACER

GRUP-7 RF07: Search user by nom/surna...

6

TAREAS POR HACER

GRUP-8 RF08: Order by parameter

6

TAREAS POR HACER

GRUP-37 Create sql planing

2

EN REVISIÓN

GRUP-4 RF04: View alumni list

6

EN REVISIÓN

Añadir un comentario...

Consejo de expertos: pulsa M para comentar

Sprints

GRUP-26 ALUMNI LIST MODULE

GRUP-27 FORUM MODULE

GRUP-28 ANNOUNCEMENTS MODULE

GRUP-29 STATS MODULE

GRUP-30 ROLE MANAGEMENT MODULE

+ Crear Epic

Hoy

Semanas

Meses

Trimestres

GRUP-27

Descripcion

Editar descripción

Ordenar por

0 % hecho

GRUP-14 RF14: View posts

6

TAREAS POR HACER

GRUP-11 RF11: Create forum post

3

TAREAS POR HACER

GRUP-15 RF15: Select post

6

TAREAS POR HACER

GRUP-12 RF12: Delete post

3

TAREAS POR HACER

GRUP-13 RF13 Edit post

2

TAREAS POR HACER

GRUP-16 RF16: Post search

7

TAREAS POR HACER

Añadir un comentario...

Consejo de expertos: pulsa M para comentar

Daily Stand Up meeting & Retrospective meeting:

[Daily Stand Up meeting & Retrospective meeting](#)
[Grup3ERPAlumni - Agile board - Jira \(atlassian.net\)](#)

<https://gitlab.com/grup-3-erp-alumni/erp-alumni.git>