Universidad Peruana de Ciencias Aplicadas -Informe de Trabajo Final

Desarrollo de Aplicaciones Open Source - SW57

Startup: DeltaTech Producto: DiligenceTech Profesor: Velasquez Nuñez, Angel Integrantes: Ortega Huaraca, Abel: U20201B380 Herrera Gonzalez, Luis: U202218227 Elsner De la Torre Ugarte, Julio: U202111654 Adrianzén Flores, Carlos: U202215705 Garayar Mori, Oscar: U202014115

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Registro de Versiones del Informe

Versión	Fecha	Autor	Descripción

Project Report Collaboration Insights

Para acceder al Github de la organización, haga click a la URL.

Student Outcome

El curso contribuye al cumplimiento del Student Outcome ABET: ABET-EAC - $Student\ Outcome\ 3$

• Criterio: Capacidad de comunicarse efectivamente con un rango de audiencias.

En el siguiente cuadro se describe las acciones realizadas y enunciados de conclusiones por parte del grupo, que permiten sustentar el haber alcanzado el logro del ABET-EAC - $Student\ Outcome\ 3$.

DeltaTech Logo

Figura 1: DeltaTech Logo

Capítulo I: Introducción

Startup Profile

Descripción de la Startup

DeltaTech: Automatizando la Due Diligence en Línea

DeltaTech es una startup centrada en ofrecer soluciones innovadoras para el proceso de due diligence en línea. Nos especializamos en la automatización de una variedad de procesos, desde el análisis de datos financieros de empresas hasta la revisión de sus estados de cuenta, entre otras funciones críticas. Nuestras plataformas tecnológicas están diseñadas para proporcionar una manera eficiente y precisa de llevar a cabo una debida diligencia exhaustiva durante transacciones comerciales, como la venta de empresas. En DeltaTech, nos comprometemos a simplificar y agilizar el proceso de evaluación, permitiendo a nuestros clientes tomar decisiones informadas con confianza. Cada solución que desarrollamos está impulsada por la búsqueda constante de la excelencia en la eficiencia operativa y la precisión en el análisis de datos. En DeltaTech, estamos transformando la forma en que se aborda la due diligence en línea, llevando la automatización al centro de las transacciones comerciales del siglo XXI.

Recurso extraído de Canva

Figura 2: Recurso extraído de Canva

Misión

Nuestra misión en DeltaTech es proporcionar soluciones innovadoras y
eficientes para el proceso de due diligence en línea, permitiendo a nuestros
clientes realizar evaluaciones exhaustivas de manera rápida y precisa durante transacciones comerciales críticas, como la venta de empresas. Nos
esforzamos por automatizar y simplificar el análisis de datos financieros,
brindando a los inversores las herramientas necesarias para tomar decisiones
informadas y estratégicas que impulsen el éxito en sus operaciones.

Visión

• Nuestra visión en DeltaTech es transformar la forma en que se realiza la debida diligencia, siendo líderes en el desarrollo de plataformas tecnológicas avanzadas que agilizan el análisis de información financiera. Nos comprometemos a ofrecer una experiencia de usuario excepcional a través de interfaces intuitivas y seguras, respaldadas por algoritmos avanzados y cifrado de datos de extremo a extremo. Buscamos ser reconocidos como socios confiables y fundamentales en el éxito de las transacciones comerciales, facilitando la toma de decisiones estratégicas para nuestros clientes en todo momento.

Perfiles de integrantes del equipo

Nuestro equipo está conformado por individuos apasionados y comprometidos, cada uno aportando sus habilidades únicas para lograr nuestros objetivos de manera efectiva y colaborativa. Aquí se muestra a nuestros miebros clave:

Solution Profile

En el cambiante mundo empresarial actual, la debida diligencia financiera se ha convertido en un pilar fundamental para asegurar transacciones comerciales seguras y exitosas. Sin embargo, el proceso tradicional de recolección y análisis de datos financieros de empresas puede ser lento, tedioso y propenso a errores. Esta realidad ha generado una necesidad urgente de encontrar soluciones innovadoras que permitan a los inversores realizar este crucial proceso de manera más eficiente y efectiva. En este contexto, surge una nueva era de la debida diligencia financiera, donde la tecnología y la inteligencia se unen para ofrecer soluciones ágiles y precisas. La búsqueda de métodos más inteligentes para acceder y analizar datos financieros se ha convertido en una prioridad para los profesionales que buscan tomar decisiones informadas y estratégicas en sus inversiones.

Antecedentes y problemática

What

- El proceso tradicional de due diligence se caracteriza por ser laborioso, costoso y propenso a errores.
- Los inversores y profesionales financieros revisan una gran cantidad de documentos financieros, legales y operativos en un tiempo limitado.
- Esto puede resultar en la contratación de servicios adicionales y gastos innecesarios.

Who

- Inversores y profesionales financieros se ven afectados por la complejidad y la carga de trabajo del proceso tradicional de due diligence.
- Propietarios de empresas enfrentan el desafío de compartir información confidencial con inversores potenciales.

Where

Esta problemática es común en transacciones comerciales y de inversión, donde la debida diligencia es crucial.

When

La problemática surge en cada proceso de adquisición o inversión, donde la toma de decisiones debe realizarse en un tiempo limitado.

Why

- La falta de acceso rápido y la preocupación por la seguridad de la información sensible de la empresa dificultan la toma de decisiones.
- Existe el riesgo de que los inversores utilicen los datos sensibles con otros fines, lo que genera incertidumbre y desconfianza.

How

- Para abordar estos desafíos, nuestra solución se basa en el desarrollo de una web application.
- Implementaremos algoritmos avanzados para agilizar el proceso de análisis de datos financieros.
- Diseñaremos una interfaz intuitiva que permita a los usuarios acceder y revisar información de manera rápida y segura.
- Incorporaremos un sistema de cifrado de datos de extremo a extremo para garantizar la seguridad y confidencialidad de la información.
- Realizaremos pruebas exhaustivas y ajustes continuos para asegurar el funcionamiento óptimo de la plataforma en todo momento.

How Much

 Los costos asociados con la implementación de nuestra solución de Diligence Tech dependerán del tamaño y las necesidades específicas de cada empresa.

- Ofreceremos planes de suscripción flexibles para adaptarse a diferentes presupuestos y volúmenes de trabajo.
- Los costos se basarán en un modelo de suscripción mensual o anual, con opciones de escalabilidad según las demandas del usuario.
- Adicionalmente, ofreceremos servicios de capacitación y soporte técnico para garantizar una adopción exitosa y continua de la plataforma.

Recurso extraído de Canva

Figura 3: Recurso extraído de Canva

Lean UX Process

Lean UX Problem Statements Problem Statement 1

- Nuestro contexto se enfoca en mejorar la eficiencia y precisión del análisis financiero para los contadores financieros durante el proceso de due diligence.
- Hemos identificado un problema crítico que afecta a los contadores financieros al realizar el análisis exhaustivo de los documentos financieros de las empresas. Actualmente, los contadores enfrentan dificultades significativas al obtener de manera oportuna y eficiente los documentos necesarios para llevar a cabo una diligencia debida completa. Esta falta de acceso rápido y efectivo a la información financiera puede resultar en retrasos en el proceso de análisis y en la toma de decisiones, impactando negativamente la eficiencia y precisión del trabajo del contador.
- ¿Cómo podemos mejorar el acceso y la obtención eficiente de los documentos financieros para los contadores durante el proceso de due diligence, con el fin de agilizar y mejorar la calidad de su trabajo?

Problem Statement 2

- Nuestro enfoque se centra en proporcionar a los inversores una plataforma intuitiva y eficiente para la evaluación de oportunidades de inversión durante el proceso de due diligence.
- Los inversores se enfrentan a la dificultad de realizar un análisis exhaustivo y preciso de la salud financiera y los riesgos potenciales de las empresas objetivo. Actualmente, experimentan desafíos al acceder y comparar de manera eficiente la información financiera de múltiples empresas, lo que puede llevar a decisiones de inversión subóptimas o basadas en datos incompletos.
- ¿Cómo podemos proporcionar a los inversores una plataforma intuitiva y eficiente que les permita acceder, comparar y analizar de manera efectiva la información financiera de las empresas, con el objetivo de facilitar la toma de decisiones informadas y estratégicas?

Lean UX Assumptions Business Assumptions:

- 1. Creo que mis clientes necesitan una herramienta eficiente y confiable para realizar sus análisis financieros exhaustivos durante el proceso de due diligence.
- 2. Estas necesidades se pueden resolver con nuestra plataforma inteligente que automatice el análisis financiero y que ofrezca acceso rápido y seguro a información relevante de las empresas objetivo.
- 3. Mis clientes iniciales son inversores y contadores financieros que trabajan en sell-side.
- 4. El valor #1 que un cliente quiere de mi servicio es una manera eficiente y precisa de realizar sus transacciones durante el proceso de due diligence.
- 5. El cliente también puede obtener estos beneficios adicionales como una mayor confianza en el proceso de due diligence, una mayor seguridad de los datos financieros y una experiencia de usuario mejorada.
- 6. Voy a adquirir la mayoría de mis clientes a través de campañas de marketing dirigidas a empresas de capital privado, fondos de inversión y otros actores clave en el mercado de transacciones
- 7. Haré dinero a través de la venta de suscripciones a nuestra plataforma "Diligence Tech", ofreciendo diferentes niveles de acceso según las necesidades del cliente.
- Mi competencia principal en el mercado serán otras plataformas de due diligence en línea, así como servicios tradicionales de consultoría que ofrecen análisis de datos financieros.
- 9. Los venceremos debido a nuestra capacidad para ofrecer una solución tecnológica más rápida, precisa y fácil de usar que nuestras competidoras, así como nuestro enfoque en la seguridad de los datos y la experiencia del usuario..
- 10. El mayor riesgo del producto es que la tecnología pueda no funcionar como se espera, lo que podría resultar en errores en los datos o brechas de seguridad.
- 11. **Resolveremos esto a través de la** implementación de rigurosas pruebas de calidad y seguridad, así como la rápida corrección de errores a medida que surjan.
- 12. ¿Qué otras suposiciones tenemos? ¿Eso, si se prueba que es falso, causará que nuestro negocio/proyecto no funcione? Otras suposiciones que tenemos son si:
 - Existe una demanda significativa.

- La automatización de datos financieros mejorará el proceso de due diligence.
- Garantizar la seguridad y privacidad de los datos financieros de las empresas objetivo a través de cifrado de extremo a extremo generará confianza entre los usuarios

Business Outcomes:

- Aumentar la eficiencia operativa de las empresas al reducir el tiempo y los recursos necesarios para completar el proceso de due diligence.
- Proporcionar una plataforma segura, intuitiva y efectiva que aumente la satisfacción del cliente y promueva la retención a largo plazo.
- Ganar una ventaja competitiva al ofrecer características avanzadas, seguridad de datos y facilidad de uso que superan a los competidores.

Users Assumptions:

User Assumption - Problem Statement 1

1. ¿Quién es el usuario?

Los usuarios son los contadores financieros que buscan agilizar su proceso de due diligence e inversores que contratan empresas financieras que buscan una visualización más accesible de los resultados.

2. ¿Qué problemas tiene nuestro producto? ¿Resolver?

- Dificultad para acceder y analizar rápidamente datos financieros de empresas objetivo durante el proceso de debida diligencia.
- Riesgos asociados con la falta de seguridad y privacidad de los datos financieros sensibles.
- Falta de eficiencia en el proceso de debida diligencia debido a la dependencia de métodos manuales y lentos.

3. ¿Qué características son importantes?

- Automatización del análisis de datos financieros.
- Seguridad de datos con cifrado de extremo a extremo.
- Interfaz de usuario intuitiva y fácil de usar.
- Acceso rápido y seguro a información financiera relevante.
- Funcionalidades avanzadas de visualización y generación de informes.

4. ¿Dónde encaja nuestro producto en su trabajo o vida?

Encaja en el proceso de trabajo de los usuarios al proporcionar una plataforma centralizada y eficiente para realizar análisis exhaustivos de datos financieros de empresas

5. ¿Cuándo y cómo es usado nuestro producto?

Es utilizado por los usuarios durante todo el proceso de debida diligencia, desde la evaluación inicial de una empresa objetivo hasta la finalización de la transacción comercial.

6. ¿Cómo debe verse nuestro producto y cómo comportarse?

Debe tener una apariencia profesional y moderna, con una interfaz de usuario limpia y organizada que facilite la navegación y el acceso a las herramientas y funciones clave. El producto debe comportarse de manera fluida y rápida, brindando respuestas instantáneas a las consultas de los usuarios y garantizando la seguridad y confiabilidad de los datos financieros manipulados.

User Assumption - Problem Statement 2

1. ¿Quién es el usuario?

Los usuarios son inversores que buscan oportunidades de inversión y necesitan realizar una diligencia debida exhaustiva para evaluar la salud financiera y los riesgos potenciales de las empresas objetivo.

2. ¿Qué problemas tiene nuestro producto? ¿Resolver?

- Dificultad para acceder y comparar de manera eficiente la información financiera de múltiples empresas durante el proceso de due diligence.
- Riesgos asociados con la toma de decisiones basadas en datos financieros incompletos o inexactos.
- Falta de una plataforma centralizada y fácil de usar para analizar y evaluar oportunidades de inversión de manera efectiva.

3. ¿Qué características son importantes?

- Interfaz de usuario intuitiva y eficiente que permita una navegación fluida y acceso rápido a la información financiera clave.
- Funcionalidades avanzadas de comparación y análisis de datos financieros para facilitar la toma de decisiones informadas.
- Seguridad de datos avanzada para garantizar la confidencialidad y protección de la información financiera sensible.
- Herramientas de visualización y generación de informes que permitan una comprensión clara y rápida de la salud financiera de las empresas objetivo.

4. ¿Dónde encaja nuestro producto en su trabajo o vida?

Nuestro producto encaja en el proceso de trabajo de los inversores al proporcionar una plataforma centralizada y completa para evaluar y comparar oportunidades de inversión durante el proceso de due diligence.

5. ¿Cuándo y cómo es usado nuestro producto?

- Es utilizado por los inversores desde el inicio del proceso de evaluación de una empresa objetivo hasta la toma final de decisiones de inversión.
- Los inversores utilizan nuestro producto para analizar los estados financieros, realizar comparaciones entre empresas y evaluar los riesgos y oportunidades de inversión.

6. ¿Cómo debe verse nuestro producto y cómo comportarse?

- Nuestro producto debe tener una apariencia profesional y moderna, con una interfaz de usuario clara y organizada que facilite la comparación y análisis de datos.
- Debe comportarse de manera eficiente y rápida, brindando resultados precisos y actualizados de manera oportuna.

• La seguridad y confidencialidad de los datos financieros es fundamental, por lo que el producto debe garantizar un cifrado sólido y medidas de protección avanzadas.

$User\ outcomes:$

- Acceso de manera rápida y eficiente a la información financiera relevante de las empresas objetivo.
- Confianza en la seguridad y privacidad de los datos financieros sensibles
- Experiencia de usuario mejorada gracias a la interfaz intuitiva y fácil de usar

Feature Assumptions

Para el Problem statement 1:

• Herramientas Avanzadas de Analisis Financiero:

Funciones especializadas para analizar estados financieros, ratios financieros, tendencias históricas y comparaciones sectoriales.

• Automatización de Procesos Repetitivos:

Capacidad de automatizar tareas como la extracción de datos financieros, el cálculo de ratios y la generación de informes estándar.

• Integración con Fuentes de Datos Externos:

Posibilidad de integrar datos de múltiples fuentes, como bases de datos financieras externas o sistemas de contabilidad.

• Seguridad y Confidencialidad Reforzadas:

Funciones adicionales de seguridad, como permisos de acceso específicos, para garantizar la confidencialidad de la información financiera.

• Visualización de Datos Interactiva:

Gráficos interactivos y tablas dinámicas para visualizar los datos financieros de manera clara y comprensible.

Para el Problem Statement 2:

• Interfaz de Usuario Intuitiva:

- Los inversores podrán navegar fácilmente por la plataforma y acceder a las herramientas clave de análisis financiero.
- Se asume que una interfaz limpia y organizada facilitará la comparación y evaluación de empresas.

• Herramientas Avanzadas de Análisis:

- Los inversores podrán utilizar herramientas avanzadas para comparar rápidamente los datos financieros de múltiples empresas.
- Se asume que características como gráficos interactivos, análisis comparativos y tablas dinámicas mejorarán la eficiencia del análisis.

• Funcionalidades de Seguridad Avanzada:

- Los inversores confiarán en la plataforma debido a las medidas de seguridad avanzada, como cifrado de extremo a extremo y autenticación de dos factores.
- Se asume que la seguridad sólida garantizará la protección de los datos financieros confidenciales.

• Generación de Informes Personalizados:

- Los inversores podrán crear informes personalizados basados en sus criterios de evaluación y preferencias.
- Se asume que los informes detallados y personalizados facilitarán la toma de decisiones informadas.

• Alertas y Notificaciones Relevantes:

- Los inversores recibirán alertas sobre cambios significativos en los datos financieros de las empresas en su lista de seguimiento.
- Se asume que las alertas oportunas y relevantes mejorarán la capacidad de reacción a los cambios en las empresas objetivo.

Lean UX Hypothesis Statements Hypothesis - Problem Statement 1

- Creemos que los contadores financieros valoran la eficiencia y precisión en el análisis de datos financieros durante el proceso de due diligence. Sabremos que esto es cierto cuando observemos una disminución significativa en el tiempo dedicado al análisis manual de datos, medido por una reducción del 30% en el tiempo promedio necesario para completar una diligencia debida.
- Creemos que la seguridad y privacidad de los datos financieros sensibles es una preocupación clave para los contadores financieros durante el proceso de due diligence. Sabremos que esto es cierto cuando veamos una mayor confianza en la plataforma "DiligenceTech" por parte de los contadores, medido por una reducción del 20% en las solicitudes de soporte relacionadas con la seguridad de los datos.

Hypothesis - Problem Statement 2

- Creemos que los inversores valoran la facilidad y rapidez de acceso
 a información financiera relevante durante el proceso de due diligence.
 Sabremos que esto es cierto cuando observemos un aumento en la
 eficiencia y precisión en la toma de decisiones de inversión, medida a través
 de una reducción del tiempo dedicado a la investigación y una mayor
 satisfacción del usuario.
- Creemos que la seguridad y privacidad de los datos financieros sensibles es una preocupación clave para los inversores durante el proceso de due diligence. Sabremos que esto es cierto cuando veamos un aumento en la confianza de los inversores en la plataforma, medido por una mayor adopción de "DeltaTech" y retroalimentación positiva sobre las medidas de seguridad implementadas.

Artefacto creado en Figma (URL)

Figura 4: Artefacto creado en Figma (URL)

Tabla del segmento 1

Figura 5: Tabla del segmento 1

Lean UX Canvas

Segmentos objetivo

Capítulo II: Requirements Elicitation & Analysis

Competidores

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Análisis competitivo

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Estrategias y tácticas frente a competidores

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Tabla del segmento 2

Figura 6: Tabla del segmento 2

electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Entrevistas

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Diseño de entrevistas

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Registro de entrevistas

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Análisis de entrevistas

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Needfinding

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User Personas

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User Task Matrix

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User Journey Mapping

Empathy Mapping

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As-is Scenario Mapping

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Ubiquitous Language

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Capítulo III: Requirements Specification

To-Be Scenario Mapping

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User Stories

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Impact Mapping

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Product Backlog

Capítulo IV: Product Design

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Style Guidelines

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General Style Guidelines

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Web Style Guidelines

Information Architecture

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$Organization \ Systems$

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Labeling Systems

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SEO Tags and Meta Tags

Searching Systems

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Navigation Systems

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Landing Page UI Design

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Landing Page Wireframe

Landing Page Mock-up

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Web Applications UX/UI Design

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Web Applications Wireframes

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Web Applications Wireflow Diagrams

$Web\ Applications\ Mock-ups$

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Web Applications User Flow Diagrams

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Web Applications Prototyping

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Domain-Driven Software Architecture

Software Architecture Context Diagram

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Software Architecture Container Diagrams

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Software Architecture Components Diagrams

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Software Object-Oriented Design

Class Diagrams

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Class Dictionary

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Database Design

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Database Diagram

Capítulo V: Product Implementation, Validation & Deployment

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Software Configuration Management

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Software Development Environment Configuration

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Source Code Management

Source Code Style Guide & Conventions

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Software Deployment Configuration

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Landing Page, Services & Applications Implementation

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Sprint n

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Conclusiones

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Conclusiones y recomendaciones

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Video About-the-Team

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Bibliografía