

P3 - Project Specification



Mestrado Integrado em Engenharia Informática e Computação

Sistemas de Informação

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1 Project Overview

The 360° Company Dashboard is a web application developed within the curricular unit of Information Systems, a part of the Master degree in Informatics and Computing Engineering, to provide complete information about the company status.

The entry point of the web application being the overview dashboard, it includes a box for every category with the most important piece of information about sales orders, purchases, inventory, and accounts payable, every box is a segway to a page that is more in-depth about the category.

The web application gets its information from the standard audit file for tax purposes or SAF-T.

2 Functionalities / Features

CoreView	Functionality/Feature	Description
All	Change Period	As a User, i want to set a timetable to filter company's results.
	Download SAF-T	As a User, i want to download SAF-T in CSV format.

Table 1: Functionalities/Features present on all the core views

CoreView	Functionality/Feature	Description
Overview Dashboard	Total Sales	As a User, i want to see the company's total sales in a specific timetable.
	Total Purchases	As a User, i want to see the company's total purchases in a specific timetable.
	Inventory Value	As a User, i want to see the company's inventory value in a specific timetable.
	Gross Profit Ratio	As a User, i want to see the company's gross profit ratio in a specific timetable.
	Most Valuable Customer	As a User, i want to see the company's most valuable customer in a specific timetable.
	Best-Seller Product	As a User, i want to see the company's best-seller product in a specific timetable.
	Liquidity	As a User, i want to see the company's liquidity in a specific timetable.

Table 2: Functionalities/Features present on the Overview Dashboard

CoreView	Functionality/Feature	Description
Sales Dashboard	Sales per Day/Month Graphic	As a User, i want to see a graphic of Sales by Day/Month in a specific timetable.
	Clients per Day/Month Graphic	As a User, i want to see a graphic of Clients by Day/Month in a specific timetable.
	Top Five Best-Selling Products	As a User, i want to see the company's five best-selling products in a specific timetable.
	Top Five Most Valuable Customers	As a User, i want to see the company's five best valuable customers in a specific timetable.
	Total Sales	As a User, i want to see the company's total sales in a specific timetable.
	Sales Growth	As a User, i want to see the company's sales growth in a specific timetable.

Table 3: Functionalities/Features present on the Sales Dashboard

CoreView	Functionality/Feature	Description
Purchases Dashboard	Total Purchases	As a User, i want to see the company's total purchases in a specific timetable.
	Purchases per Day/Month Graphic	As a User, i want to see a graphic of Purchases by Day/Month in a specific timetable.
	Suppliers per Day/Month Graphic	As a User, i want to see a graphic of Suppliers by Day/Month in a specific timetable.
	Top Five Most Valuable Suppliers	As a User, i want to see the company's five best valuable suppliers in a specific timetable.
	Purchases Growth	As a User, i want to see the company's purchases growth in a specific timetable.

Table 4: Functionalities/Features present on the Purchases Dashboard

CoreView	Functionality/Feature	Description
Products Dashboard	Total Stock Value	As a User, i want to see the company's total inventory value in a specific timetable.
	Total Stock Items	As a User, i want to see the company's number of stock items in a specific timetable.
	Stock History per Day/Month Graphic	As a User, i want to see a graphic of Stock History by Day/Month in a specific timetable.
	Stock Table	As a User, i want to see and search a product in a stock list, in a specific timetable.
	Top five Most Urgent Buys	As a User, i want to see the company's five most urgent buys in a specific timetable.
	Stock Growth	As a User, i want to see the company's stock growth in a specific timetable.

Table 5: Functionalities/Features present on the Products Dashboard

CoreView	Functionality/Feature	Description
Financials Dashboard	Return Sales	As a User, i want to see the company's total return on sales in a specific timetable.
	Return Assets	As a User, i want to see the company's total return on assets in a specific timetable.
	Return Equity	As a User, i want to see the company's total return on equity in a specific timetable.
	Profit Growth	As a User, i want to see the company's profit growth in a specific timetable.
	Liquidity Graphic	As a User, i want to see a graphic of the company's liquidity in a specific timetable.

Table 6: Functionalities/Features present on the Financials Dashboard

3 Information Architecture (Core Views)

3.1 Site-Map

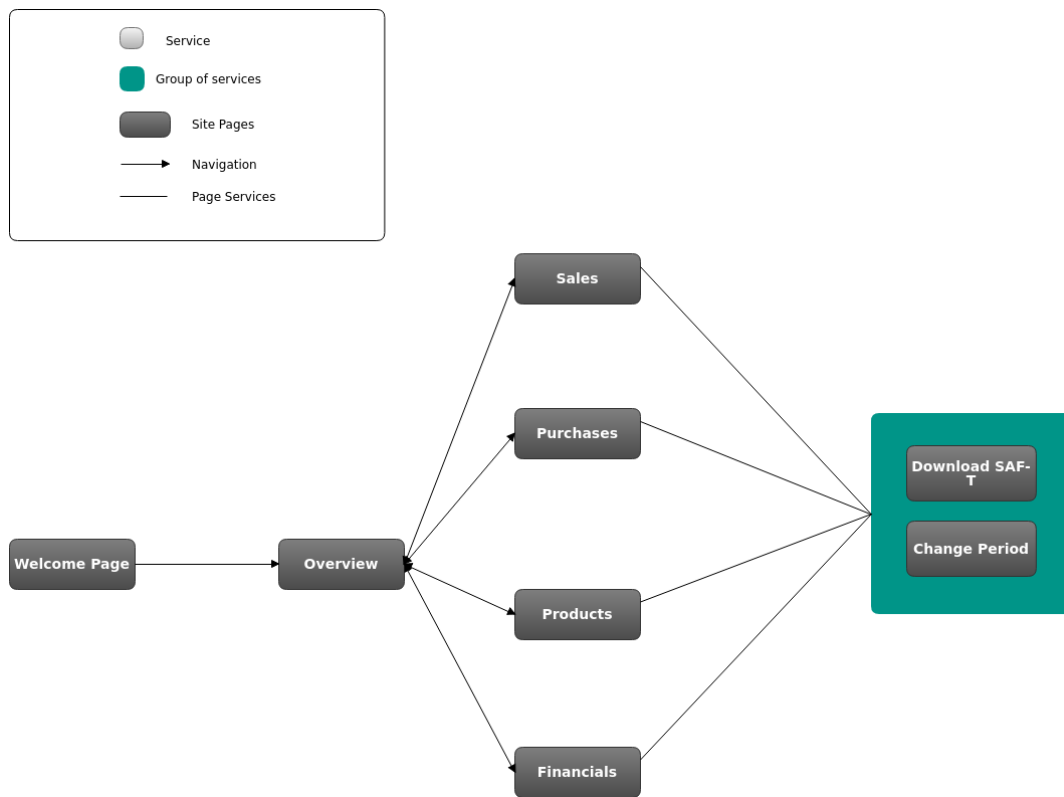


Figure 1: Site-Map

3.2 Core-Views

3.2.1 Overview Dashboard

	The Core	OUTWARDS
INWARDS - Menu.	<ul style="list-style-type: none">- Company overview.- Managing tool for the company.- Quick view of the company state.	<ul style="list-style-type: none">- Download SAF-T as csv file.<ul style="list-style-type: none">- Change the period of the analysis.- Show the information on the respective page when a card is clicked.

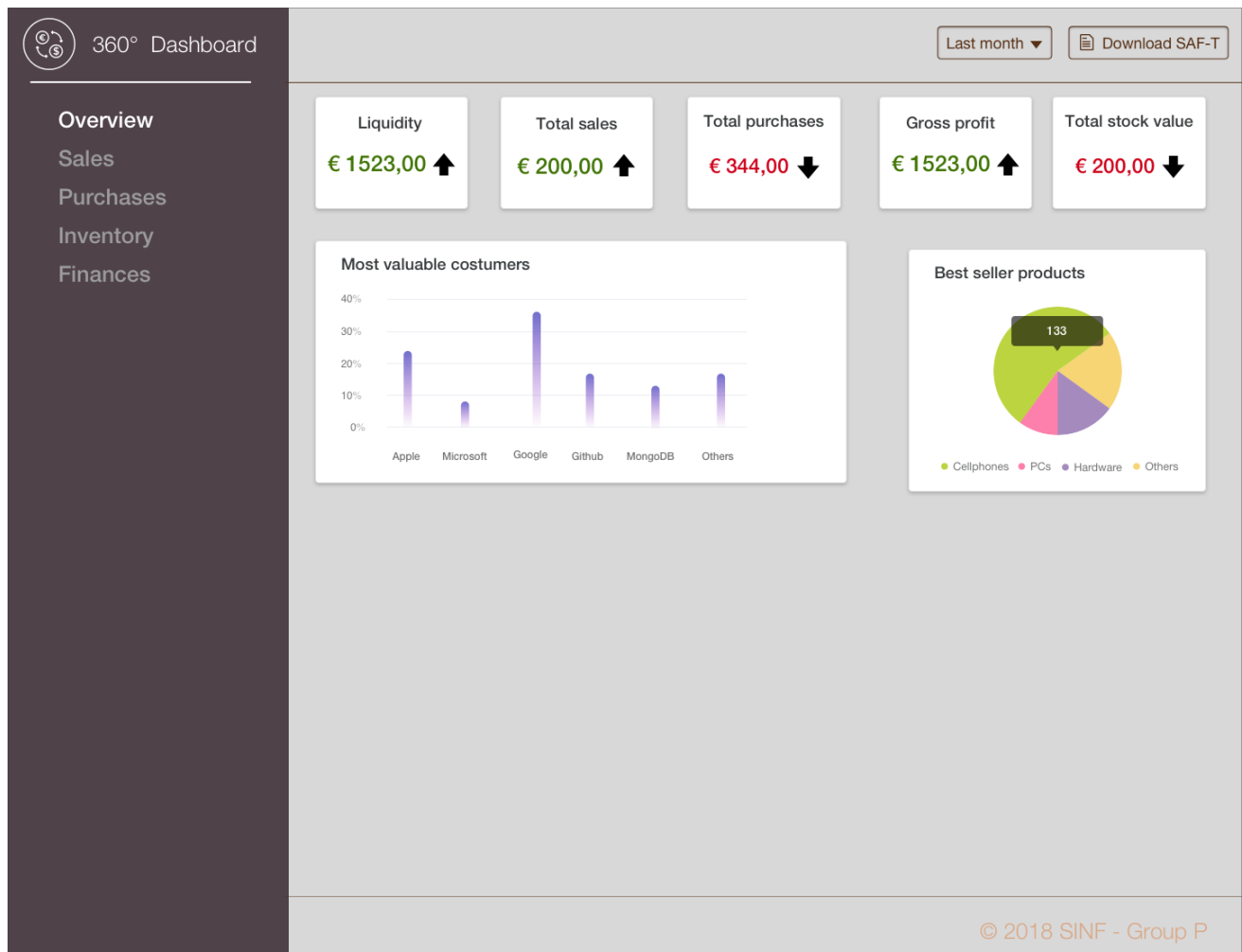


Figure 2: Overview Dashboard Mockup

3.2.2 Sales

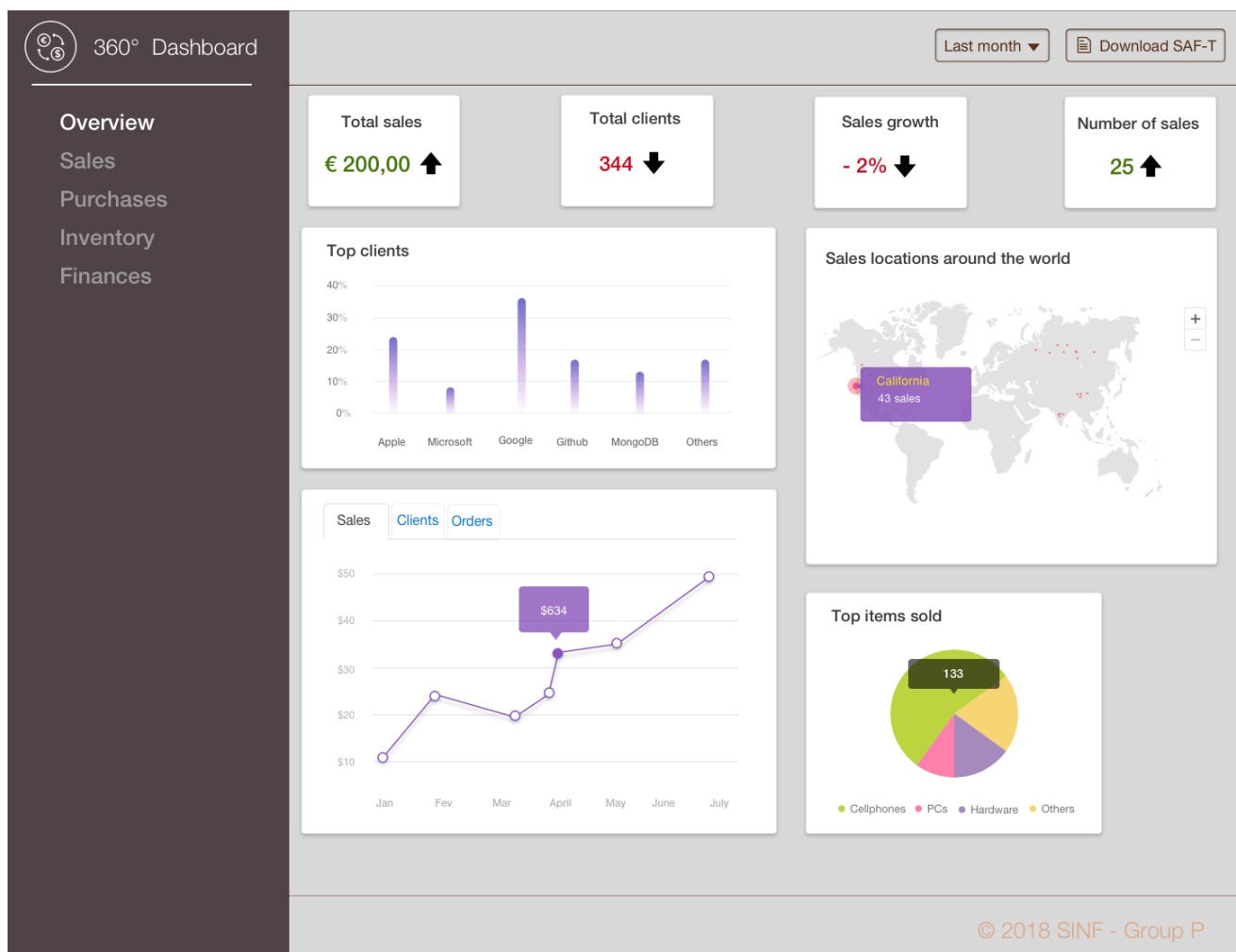
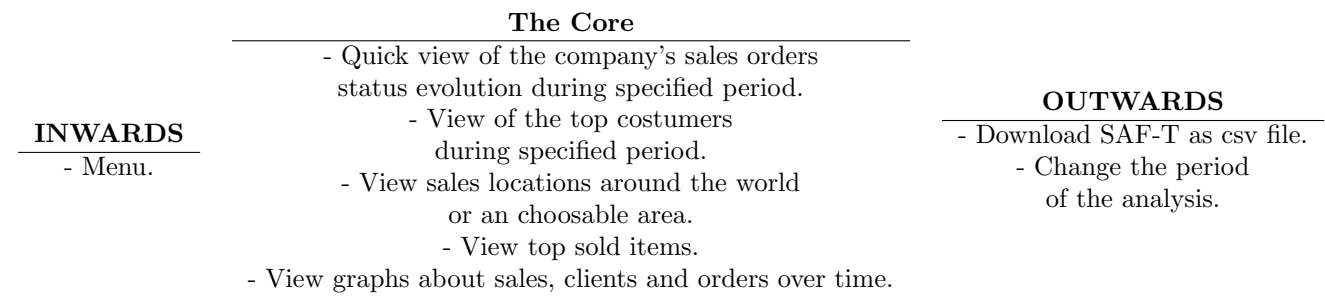


Figure 3: Sales Dashboard Mockup

3.2.3 Purchases

The Core

- Quick view of the company's purchases status evolution during the specified period
- View of the top suppliers during specified period.
- View most bought items.
- View graph about purchases and suppliers over time.
- View which items the company is spending most of the money.

INWARDS

- Menu.

OUTWARDS

- Download SAF-T as csv file.
- Change the period of the analysis.

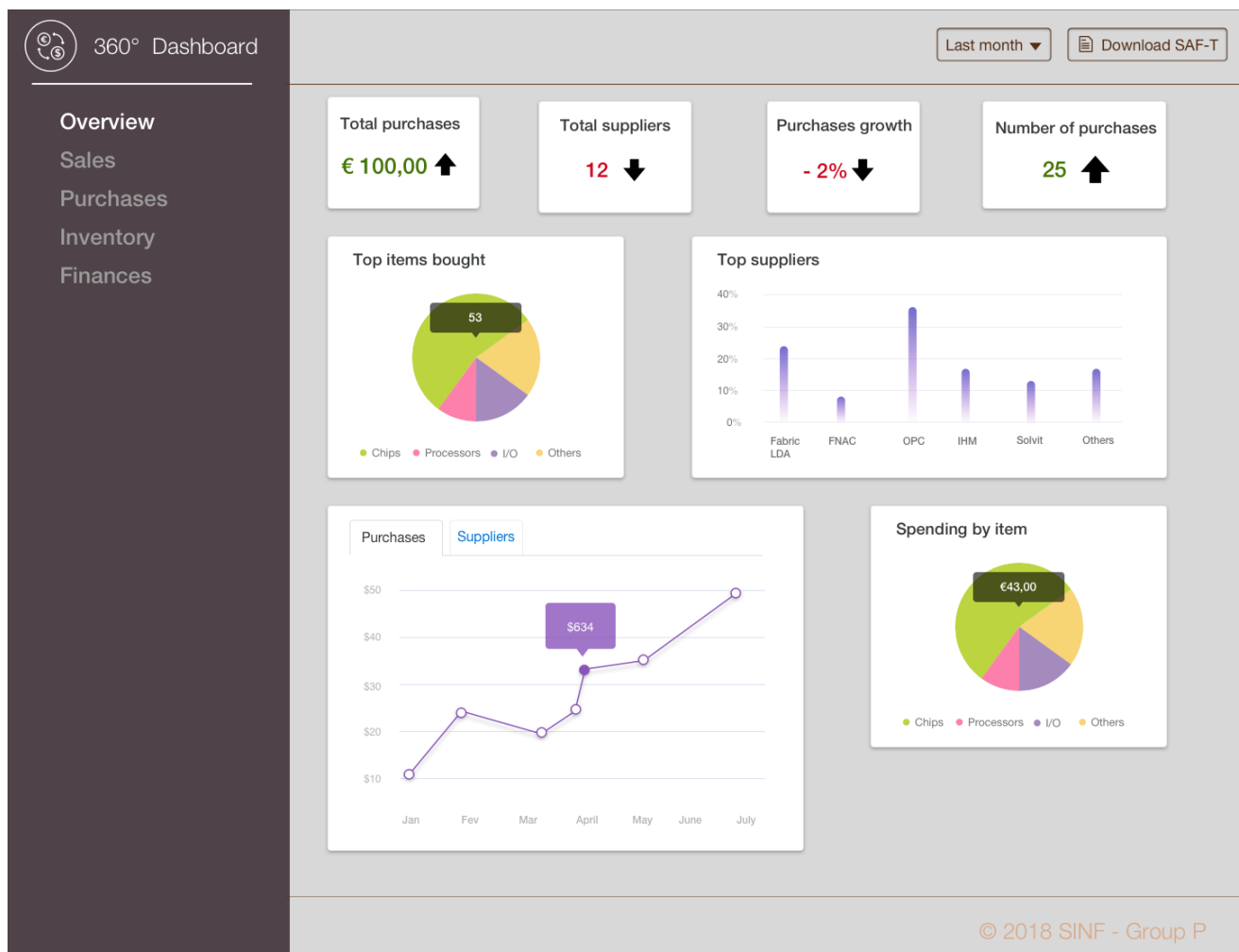


Figure 4: Purchases Dashboard Mockup

3.2.4 Products

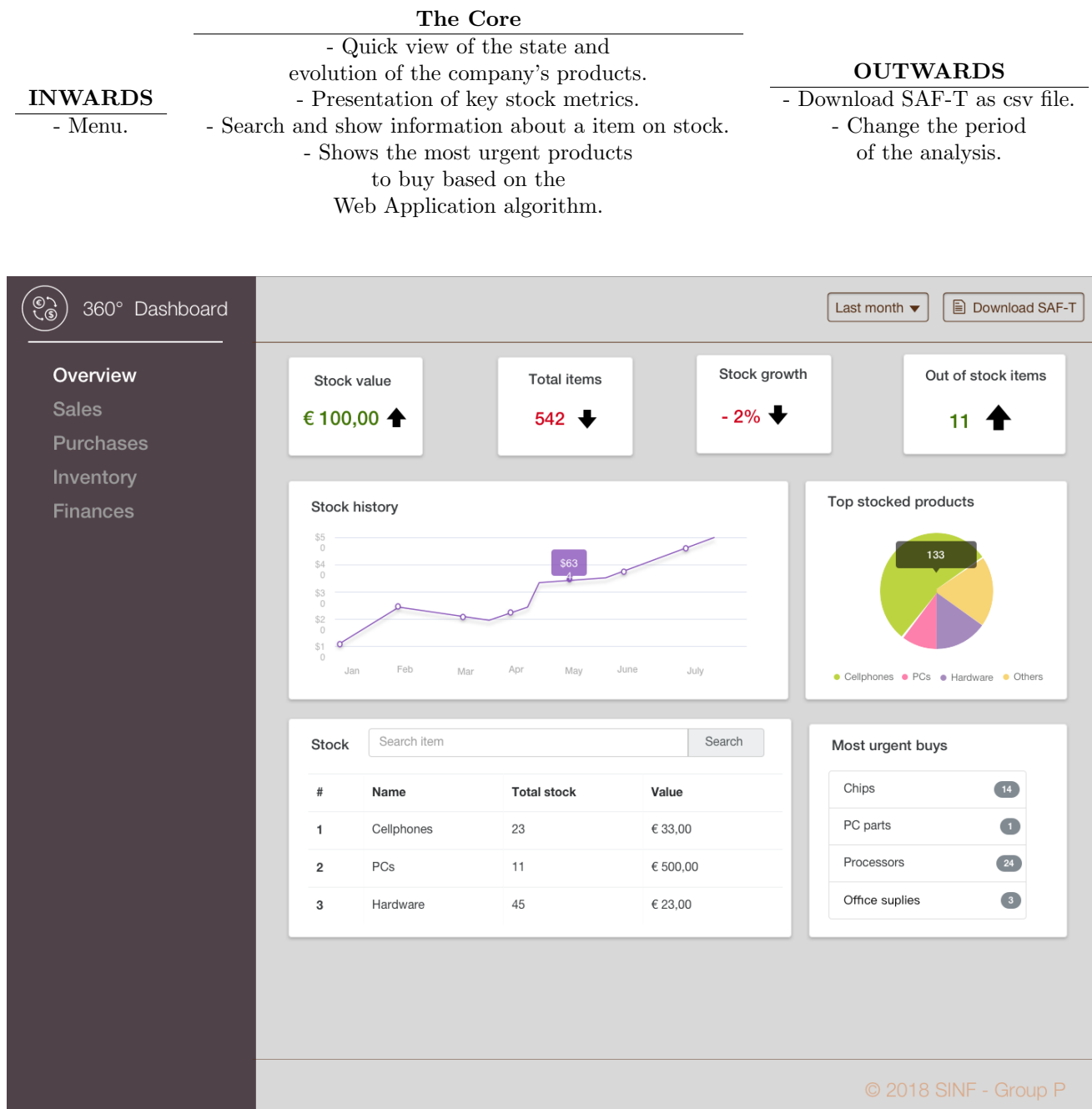


Figure 5: Products Dashboard Mockup

3.2.5 Finances

INWARDS

- Menu.

The Core

- Quick view of financial evolution compared to previous period.
- View graphs about the company finance status over time.

OUTWARDS

- Download SAF-T as csv file.
- Change the period of the analysis.

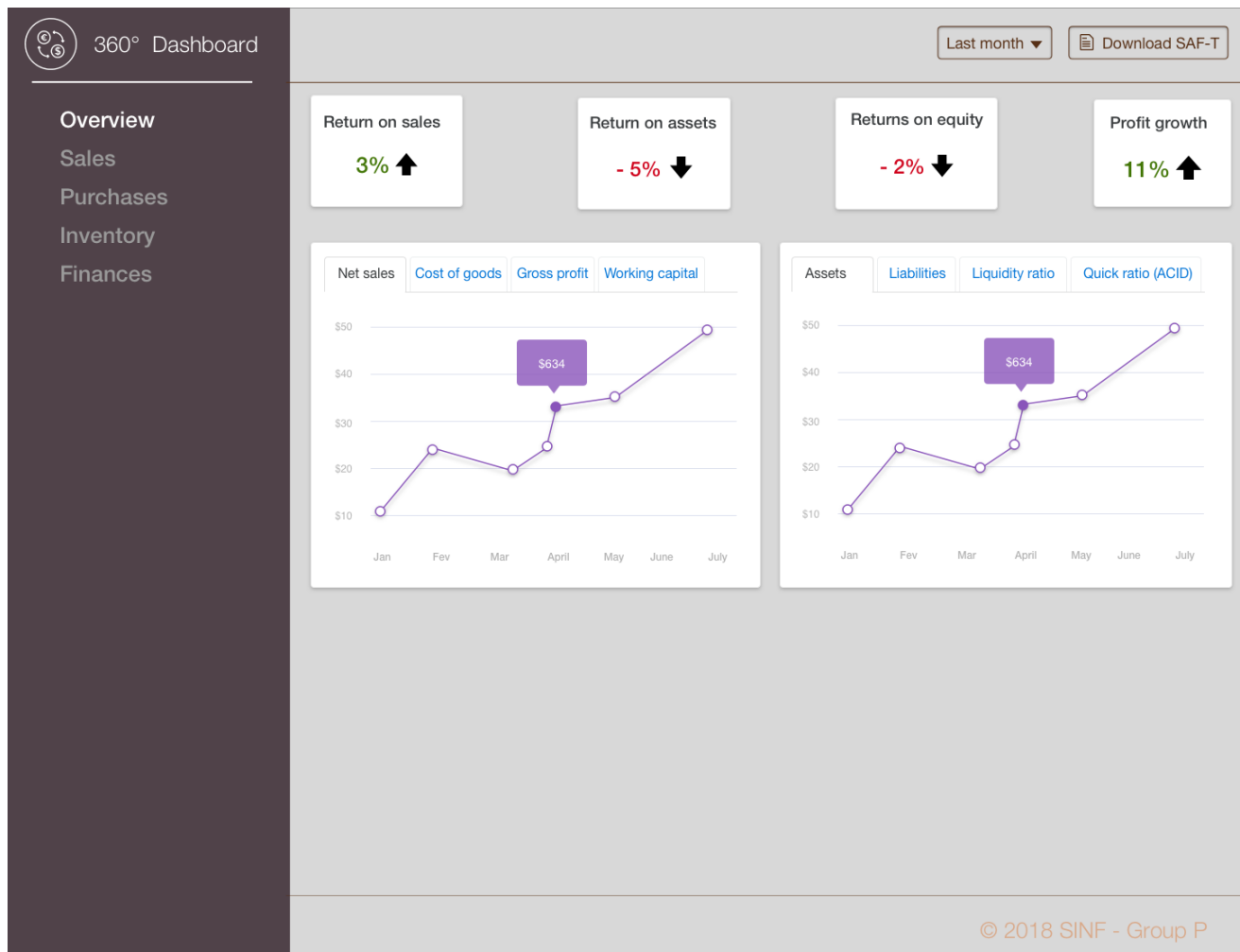


Figure 6: Finances Dashboard Mockup

4 Planning (Gantt Project)

