

# **Finanzas SD Module — R1 Release Documentation**

Finanzas SD – Architecture, Flows & SOPs

Arquitectura, Flujos y Procedimientos

November 12, 2025

# 1 Finanzas SD Module — R1 Release Documentation

## 1.1 Document Index

Welcome to the Finanzas SD Module R1 Release documentation portal. This folder contains all planning, architecture, and execution documents for the 6-lane release roadmap.

---

## 1.2 Quick Navigation

### 1.2.1 For Project Managers

- **FINANZAS\_PATH\_TO\_GREEN.md** — Executive roadmap with 6 implementation lanes and timelines
- **COPilot\_EXECUTION\_SUMMARY.md** — Autonomous agent execution summary and results

### 1.2.2 For Engineers

#### Frontend (Auth & UI)

- **LANE1\_AUTH\_UI\_TEST\_PLAN.md** — Manual test scenarios (9 tests, preflight checklist)
- **LANE1\_COMPLETION\_REPORT.md** — Lane 1 completion status and evidence
- **Start here:** Quick Auth Setup in README.md

#### Backend (SAM/RBAC)

- **FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md** — Backend architecture overview (Lanes 2-4)

#### DevOps / Infrastructure

- **FINANZAS\_PATH\_TO\_GREEN.md** — Lane 3 (CDN/CloudFront) and Lane 4 (CI/CD) specifications

#### QA / Testing

- **LANE1\_AUTH\_UI\_TEST\_PLAN.md** — Test scenarios for Lane 1 validation

### 1.2.3 For Future Reference

- **AUDIT\_FINANZAS\_MODULE\_IMPLEMENTATION.md** — Current implementation audit vs. design
- **FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md** — Technical architecture overview
- **COPilot\_OPERATING\_INSTRUCTIONS.md** — Agent operating procedures for future runs

---

### 1.3 Status Dashboard

Lane	Title	Owner	Status	Target Date
1	Auth & UI Unification	Frontend	 GREEN	 Complete
2	Backend SAM & RBAC	Backend	 Ready	Week 2
3	CDN CloudFront & SPA	DevOps	 Ready	Week 2
4	CI/CD Workflow Cleanup	DevOps	 Ready	Week 2-3
5	QA Smoke Tests	QA	 Ready	Week 3
6	Repo Hygiene & Finalization	Team	 Ready	Week 3

**Overall Status:** Lane 1  GREEN | Lanes 2-6  READY FOR EXECUTION

---

### 1.4 Lane 1: Auth & UI Unification (COMPLETE

#### 1.4.1 Status

- **Completion:** 100%
- **Preflight Checks:** 12/12 
- **Deliverables:** 6/6 
- **Test Scenarios:** 9/9 documented 
- **Code Changes Required:** NONE (implementation already correct)

#### 1.4.2 Key Achievements

1.  Unified login page (Finanzas design) with both direct and Hosted UI
2.  Token persistence (dual-key: cv.jwt + finz.jwt)
3.  Role-based routing (SDT/FIN/AUD → /finanzas/, PMO → /)
4.  SPA routing with React Router (no raw anchors)
5.  Deep link support (/finanzas/catalog/rubros works)
6.  Cognito configuration correct (domain with hyphen, OAuth redirects)

### 1.4.3 Next Steps for Manual Testing

1. Open README.md and follow “Quick Auth Setup” guide
  2. Run: npm ci && npm run dev
  3. Navigate to <http://localhost:5173/finanzas/>
  4. Execute tests 1-9 from LANE1\_AUTH\_UI\_TEST\_PLAN.md
  5. Collect evidence (screenshots, localStorage dumps)
  6. Report results
- 

## 1.5 Document Descriptions

### 1.5.1 FINANZAS\_PATH\_TO\_GREEN.md

**Purpose:** Master execution plan for R1 release

**Content:** 6 implementation lanes with detailed specifications, green criteria, and timelines

**Audience:** Project managers, team leads

**Length:** ~350 lines

### 1.5.2 LANE1\_COMPLETION\_REPORT.md

**Purpose:** Lane 1 completion documentation with full evidence

**Content:** 12 preflight checks, 6 deliverables verification, 7 code verifications, test plan summary, GREEN criteria assessment

**Audience:** Frontend engineers, QA, project managers

**Length:** ~400 lines

### 1.5.3 LANE1\_AUTH\_UI\_TEST\_PLAN.md

**Purpose:** Comprehensive test scenarios for Lane 1 validation

**Content:** 12 preflight checks (all PASS), 9 manual test scenarios with step-by-step instructions, evidence collection checklist

**Audience:** QA testers, frontend engineers

**Length:** ~250 lines

### 1.5.4 COPILOT\_EXECUTION\_SUMMARY.md

**Purpose:** Record of autonomous agent execution and findings

**Content:** What was accomplished, key findings, Lane 1 delivery details, metrics and impact, continuation plan

**Audience:** Technical leads, future developers maintaining this code

**Length:** ~350 lines

### **1.5.5 FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md**

**Purpose:** Technical architecture overview

**Content:** Auth flow, backend service design, RBAC patterns, deployment architecture

**Audience:** All engineers, architects

**Length:** ~300 lines

### **1.5.6 AUDIT\_FINANZAS\_MODULE\_IMPLEMENTATION.md**

**Purpose:** Current implementation audit against design spec

**Content:** Component-by-component review, configuration verification, identified issues

**Audience:** Technical leads, code reviewers

**Length:** ~400 lines

### **1.5.7 COPILOT\_OPERATING\_INSTRUCTIONS.md**

**Purpose:** Operating manual for autonomous Copilot agent execution

**Content:** Preflight procedure, iteration policy, evidence capture methodology, failure modes

**Audience:** Automation engineers, future Copilot runs

**Length:** ~200 lines

---

## **1.6 □ How to Use These Documents**

### **1.6.1 Scenario 1: “I need to test Lane 1”**

1. Read **LANE1\_AUTH\_UI\_TEST\_PLAN.md** (preflight checks + 9 tests)
2. Follow **README.md** → **Quick Auth Setup** section
3. Execute manual tests in local dev environment
4. Report results

### **1.6.2 Scenario 2: “I’m implementing Lane 2 (Backend)”**

1. Read **FINANZAS\_PATH\_TO\_GREEN.md** (Lane 2 specification)
2. Review **FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md** for context
3. Implement SAM template fixes and RBAC updates per specification
4. Create test plan following **LANE1\_AUTH\_UI\_TEST\_PLAN.md** format
5. Document completion per **LANE1\_COMPLETION\_REPORT.md** template

### 1.6.3 Scenario 3: “I need to understand the current architecture”

1. Read **FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md** (overview)
2. Review **AUDIT\_FINANZAS\_MODULE\_IMPLEMENTATION.md** (detailed component review)
3. Reference **LANE1\_COMPLETION\_REPORT.md** (code verification details)

### 1.6.4 Scenario 4: “I’m assigned to QA and need to validate deployment”

1. Follow **LANE1\_AUTH\_UI\_TEST\_PLAN.md** format for your lane
  2. Collect evidence per specification
  3. Document in **\$GITHUB\_STEP\_SUMMARY**
  4. Report pass/fail status to project manager
- 

## 1.7 □ Learning Resources

### 1.7.1 Understanding the Finanzas Module

- **Architecture Overview:** FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md
- **Authentication Flow:** README.md#authentication + FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md
- **RBAC & Authorization:** LANE1\_COMPLETION\_REPORT.md#rbac (search for “RBAC”)

### 1.7.2 Understanding the Release Process

- **Full Roadmap:** FINANZAS\_PATH\_TO\_GREEN.md
- **What’s Completed:** COPILOT\_EXECUTION\_SUMMARY.md
- **What’s Next:** FINANZAS\_PATH\_TO\_GREEN.md (Lanes 2-6)

### 1.7.3 Understanding How to Test

- **Lane 1 Tests:** LANE1\_AUTH\_UI\_TEST\_PLAN.md (your template)
  - **Evidence Collection:** LANE1\_COMPLETION\_REPORT.md (scroll to “Evidence Collection”)
  - **Local Dev Setup:** README.md#quick-auth-setup-local-development
- 

## 1.8 □ Questions & Issues

### 1.8.1 “What’s the current status of Lane 1?”

→ Check **Status Dashboard** above or read **LANE1\_COMPLETION\_REPORT.md**

### 1.8.2 “How do I run the manual tests?”

→ Follow **LANE1\_AUTH\_UI\_TEST\_PLAN.md** (9 test scenarios)

### 1.8.3 “What does my lane require?”

→ Read the corresponding section in **FINANZAS\_PATH\_TO\_GREEN.md**

### 1.8.4 “Where’s the architecture diagram?”

→ Reference **FINANZAS\_SERVICE\_DELIVERY\_ARCHITECTURE.md** (text-based; visual diagrams in /diagrams/)

### 1.8.5 “I found a bug not covered in these docs”

→ Create a GitHub issue with the bug details; reference the relevant section of these docs

---

## 1.9 ☰ Milestones

- ☐ **November 11:** Lane 1 (Auth & UI) complete with GREEN status
- ☐ **Week of November 18:** Lanes 2-3 (Backend + CDN) in progress
- ☐ **Week of November 25:** Lanes 4-5 (CI/CD + QA) in progress
- ☐ **Week of December 2:** Lane 6 (Repo Hygiene) + Integration testing
- ☐ **December 9:** Production release decision

---

## 1.10 ☰ Document Version History

Document	Created	Last Updated	Version
FINANZAS_PATH_TO_GREEN.md	Nov 11	Nov 11	1.0
LANE1_COMPLETION_REPORT.md	Nov 11	Nov 11	1.0
LANE1_AUTH_UI_TEST_PLAN.md	Nov 11	Nov 11	1.0
COPilot_EXECUTION_SUMMARY.md	Nov 11	Nov 11	1.0
FINANZAS_SERVICE_DELIVERY_ARCHITECTURE.md	Nov 11	Nov 11	1.0
AUDIT_FINANZAS_MODULE_IMPLEMENTATION.md	Nov 11	Nov 11	1.0
COPilot_OPERATING_INSTRUCTIONS.md	Nov 11	Nov 11	1.0
README.md	Nov 11	Nov 11	Updated

## 1.11 □ Quick Status Check

LANE 1: Auth & UI
Status: <input checked="" type="checkbox"/> GREEN
Preflight: 12/12 <input checked="" type="checkbox"/>
Deliverables: 6/6 <input checked="" type="checkbox"/>
Test Scenarios: 9/9 <input checked="" type="checkbox"/>
Code Changes: NONE <input checked="" type="checkbox"/>
Ready for: Manual Testing
LANES 2-6: Backend, CDN, CI/CD, QA
Status: <input checked="" type="checkbox"/> READY FOR EXECUTION
Documentation: <input checked="" type="checkbox"/> Complete
Specifications: <input checked="" type="checkbox"/> Detailed
Test Plans: <input checked="" type="checkbox"/> To be created
Owner Assignment: <input checked="" type="checkbox"/> Pending

## 1.12 □ Additional Resources

- **Main README:** ../README.md
- **Architecture Diagrams:** ../diagrams/
- **Infrastructure Code:** ../infra/
- **Backend Services:** ../services/
- **Source Code:** ../src/
- **Postman Collection:** ../postman/

## 1.13 □ Next Steps

1. **Frontend Team:** Execute Lane 1 manual tests (2-3 hours)
2. **Backend Team:** Begin Lane 2 implementation per specification
3. **DevOps Team:** Begin Lane 3 CDN verification in parallel
4. **Everyone:** Monitor status dashboard above for updates

**Documentation Index Last Updated:** November 11, 2025

**Status:** Lane 1  GREEN | Overall:  IN PROGRESS

**For Questions:** Reference relevant document or create GitHub issue