CVDex

QA-FullReview-Finanzas

Finanzas SD – Architecture, Flows & SOPs

Arquitectura, Flujos y Procedimientos

November 10, 2025

1 QA Full Review - Finanzas Module

Review Date: 2025-11-09
Reviewer: QA Analyst & UX Reviewer (AIGOR Supervision)
Branch: qa/full-ux-review
Environment: Development (dev stage)
Status: ☐ In Progress

1.1 Executive Summary

This document provides a comprehensive functional review of the Finanzas UI and API to ensure everything works end-to-end before production deployment. The review covers all pages, API endpoints, user workflows, charts, reports, and access control policies.

1.1.1 Review Scope

- ☐ **In Scope:** Test code, QA scripts, documentation, UI components in `src/modules/finanzas/`, API integration
- ☐ **Out of Scope:** Core business logic in `services/finanzas-api/src/handlers/**`, infrastructure stacks, acta-ui root modules

1.1.2 Environment Configuration

- **CloudFront URL:** https://d7t9x3j66yd8k.cloudfront.net
- **Finanzas UI Path:** /finanzas/
- **API Base URL:** https://m3g6am67aj.execute-api.us-east-2.amazonaws.com/dev
- **Region:** us-east-2
- **Cognito Pool ID:** us-east-2_FyHLtOhiY
- **Cognito Client ID:** dshos5iou44tuach7ta3ici5m
- **Test User:** `christian.valencia@ikusi.com`
- **User Groups:** SDT, admin, FIN, AUD

1.2 Test Checklist

1.2.1 1. Authentication & Sign-In Flow

Test Case	Status	Notes
Sign-in page loads	☐ Pending	
User can authenticate with credentials	☐ Pending	
Token is properly stored	☐ Pending	
Redirect to /finanzas/ after login	☐ Pending	
Token refresh works correctly	☐ Pending	
Sign-out clears session	☐ Pending	

1.2.2 2. Navigation & Menu Visibility

Test Case	Status	Notes
Navigation bar displays correctly	☐ Pending	
Finanzas menu items visible (SDT/FIN groups)	☐ Pending	
Rubros link navigates correctly	☐ Pending	
Rules link navigates correctly	☐ Pending	
User profile accessible	☐ Pending	
Role switcher works (if applicable)	☐ Pending	

1.2.3 3. Finanzas Home Page

Test Case	Status	Notes
Home page loads at / (with basename /finanzas/)	☐ Pending	
Page heading displays correctly	☐ Pending	
Description text renders	☐ Pending	
Two action cards present (Rubros, Rules)	☐ Pending	
Rubros card links to /catalog/rubros	☐ Pending	
Rules card links to /rules	☐ Pending	
Hover states work on cards	☐ Pending	

1.2.4 4. Catálogo de Rubros Page

Test Case	Status	Notes
Page loads at /catalog/rubros	☐ Pending	
API call to GET /catalog/rubros succeeds	☐ Pending	
Rubros data displays in table/list	☐ Pending	

Test Case	Status	Notes
All 71 rubros load correctly	☐ Pending	
Rubro fields display (ID, nombre, categoria, tipo)	☐ Pending	
Search/filter functionality works	☐ Pending	
Sorting functionality works	☐ Pending	
Pagination works (if implemented)	☐ Pending	
Loading states display correctly	☐ Pending	
Error states handled gracefully	☐ Pending	

1.2.5 5. Allocation Rules Page

Test Case	Status	Notes
Page loads at /rules	☐ Pending	
API call to GET /allocation-rules succeeds	☐ Pending	
Rules data displays correctly	☐ Pending	
Rule details visible (ID, linea_codigo, driver, priority)	☐ Pending	
Driver types displayed (percent, fixed, tickets, hours)	☐ Pending	
Rule preview functionality works	☐ Pending	
Loading states display correctly	☐ Pending	
Error states handled gracefully	☐ Pending	

1.2.6 6. API Integration Tests

Endpoint	Method	Auth	Expected Status	Status	Notes
/health	GET	None	200	☐ Pending	Public endpoint
/catalog/rubros	GET	Bearer Token	200	☐ Pending	Returns 71 rubros
/allocation-rules	GET	Bearer Token	200	☐ Pending	Returns rules
/projects	GET	Bearer Token	200 or 501	☐ Pending	May be not implemented
/projects	POST	Bearer Token	201 or 501	☐ Pending	May be not implemented
/adjustments	GET	Bearer Token	200 or 501	☐ Pending	May be not implemented
/movements	GET	Bearer Token	200 or 501	☐ Pending	May be not implemented
/payroll/ingest	POST	Bearer Token	201 or 501	☐ Pending	May be not implemented

1.2.7 7. Charts & Dashboards

Component	Status	Notes
Budget allocation charts	☐ Pending	Check if implemented
Cost breakdown visualizations	☐ Pending	Check if implemented
Project status dashboards	☐ Pending	Check if implemented
Data renders without errors	☐ Pending	
Charts responsive to data changes	☐ Pending	
Loading states for charts	☐ Pending	

1.2.8 8. Reports & Export Functionality

Feature	Status	Notes
Print button available	☐ Pending	
Print functionality works	☐ Pending	
Save/Download reports	☐ Pending	
Excel export works	☐ Pending	
PDF generation works	☐ Pending	
Files saved with correct format	☐ Pending	

1.2.9 9. CRUD Operations (if implemented)

Operation	Resource	Status	Notes
Create	Adjustment	☐ Pending	
Edit	Adjustment	☐ Pending	
Create	Project	☐ Pending	
Update	Rubro allocation	☐ Pending	
Bulk operations	Rubros	☐ Pending	

1.2.10 10. Workflows (if implemented)

Workflow	Status	Notes
Close Month	☐ Pending	
Prefactura approval	☐ Pending	
Payroll ingest	☐ Pending	
Project handoff	☐ Pending	
Success responses received	☐ Pending	

Workflow	Status	Notes
Error messages clear	☐ Pending	

1.2.11 11. Access Control & Security

Test Case	Status	Notes
Unauthorized users blocked (no FIN group)	☐ Pending	
Verified Permissions policies enforced	☐ Pending	
403 errors for restricted actions	☐ Pending	
Token validation works	☐ Pending	
Expired tokens handled	☐ Pending	
Cross-role access prevented	☐ Pending	

1.2.12 12. UI/UX Quality

Aspect	Status	Notes
Responsive design works on mobile	☐ Pending	
Consistent styling across pages	☐ Pending	
Loading indicators present	☐ Pending	
Error messages user-friendly	☐ Pending	
Navigation intuitive	☐ Pending	
Accessibility standards met	☐ Pending	

1.3 Test Execution Results

1.3.1 Test Run 1: Local Development Environment

Date: TBD
Environment: Local (npm run dev)
Status: Not Started

Setup Steps

1. Configure environment variables
2. Start local dev server
3. Open browser to http://localhost:5173/finanzas/
4. Sign in with test credentials

Results *Results will be documented here after test execution*

1.4 Findings & Issues

1.4.1 Critical Issues

No critical issues identified yet

1.4.2 Major Issues

No major issues identified yet

1.4.3 Minor Issues

No minor issues identified yet

1.4.4 Enhancement Opportunities

Enhancement suggestions will be documented here

1.5 API Response Evidence

1.5.1 Sample Responses

```
[] { "status": "ok" }
```

GET /health

```
[] { "data": [ { "rubro_id": "RB0001", "nombre": "Costo mensual de ingenieros...",
"categoria": "Ingeniería", "tipo_ejecucion": "mensual" } ], "count": 71 }
```

GET /catalog/rubros

```
[] [ { "rule_id": "AR-MOD-ING-001", "linea_codigo": "MOD-ING", "driver": "per-
cent", "priority": 10 } ]
```

GET /allocation-rules

1.6 Recommendations for Go-Live

1.6.1 Must-Have Before Production

List of critical items that must be completed

1.6.2 Nice-to-Have Improvements

List of enhancements that would improve the experience

1.6.3 Technical Debt to Address

List of technical debt items identified during testing

1.7 Test Evidence Appendix

1.7.1 Screenshots

Screenshots will be attached during test execution

1.7.2 Network Logs

Network logs will be captured during test execution

1.7.3 Console Logs

Console output will be documented here

1.8 Sign-Off

1.8.1 QA Analyst

- **Name:** AI QA Analyst
- **Date:** TBD
- **Approval:** ☐ Pending completion of all tests

1.8.2 AIGOR Supervision

- **Reviewed:** ☐ Pending
- **Approved:** ☐ Pending

1.9 Revision History

Date	Version	Changes	Author
2025-11-09	1.0	Initial document creation	QA Analyst