

Ikusi

QA Full Review - Finanzas Module

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**Finanzas SD Documentation
Documentación de Finanzas SD**

Ikusi
November 10, 2025

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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
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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	
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	

Test Case	Status	Notes
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	
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": "percent", "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
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1.9 Revision History

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