

SAFE-8 Assessment Platform

Complete User Experience Test

Comprehensive Testing Guide

Test User Details

Name: Test User

Email: jaredmoodley9@gmail.com

Company: Forvis Mazars Test

Job Title: QA Tester

Estimated Total Test Time: 60-75 minutes

Phase 1. Phase 1: User Registration & Welcome (5 minutes)

Step 1.1 - Access the Platform

1. Open browser and navigate to: <http://localhost:5173>
2. Verify homepage loads with Forvis Mazars branding
3. Verify "Get Started" or "Start Assessment" button visible

Step 1.2 - Create Lead Account

1. Click "Get Started" or "Begin Assessment"
2. Fill in the Lead Form:
 - Full Name: Test User
 - Email: jaredmoodley9@gmail.com
 - Company Name: Forvis Mazars Test
 - Job Title: QA Tester
 - Industry: Select any (e.g., "Technology")
 - Company Size: Select any (e.g., "50-200")
3. Click "Submit" or "Continue"
4. Verify welcome email received at jaredmoodley9@gmail.com
5. Verify Forvis Mazars logo displays in email header and footer

Phase 2. Phase 2: Complete Assessment (15 minutes)

Step 2.1 - Select Assessment Type

1. After registration, select assessment type
 - Recommended: Choose "CORE" for full 8-pillar assessment
2. Click "Start Assessment"

Step 2.2 - Answer Questions

1. You will see questions grouped by 8 pillars:
 - Strategy & Leadership
 - Data Readiness
 - Technology & Infrastructure
 - Skills & Talent
 - Governance & Ethics
 - Security & Compliance
 - Culture & Change
 - Value & ROI

2. For each question, select a rating (1-5 scale):

- 1 = Not at all / Very poor
- 3 = Somewhat / Average
- 5 = Completely / Excellent

3. Test Scenario - Create Varied Results:

- Rate Strategy questions: 4-5 (Strong)
- Rate Data questions: 2-3 (Moderate)
- Rate Technology questions: 4-5 (Strong)
- Rate Skills questions: 2 (Weak)
- Rate Governance questions: 3-4 (Moderate)
- Rate Security questions: 5 (Strong)
- Rate Culture questions: 2-3 (Moderate)
- Rate Performance questions: 4-5 (Strong)

4. Click "Submit Assessment" when complete

5. Verify assessment saves successfully

6. Verify redirect to results page

Phase 3. Phase 3: View Results Dashboard (10 minutes)

Step 3.1 - Results Overview

On results page, verify the following elements are displayed:

Overall Score Card:

- Overall percentage score (e.g., "78%")
- Category label (e.g., "AI Adopter")
- Color-coded indicator

8 Pillar Performance Breakdown:

- All 8 pillar names match database names:
Strategy & Leadership, Data Readiness, Technology & Infrastructure,
Skills & Talent, Governance & Ethics, Security & Compliance,
Culture & Change, Value & ROI
- Each pillar shows percentage score
- Scores match what you answered (not simulated)

Critical Gap Analysis:

- Lists pillars scoring below 80%
- Shows gap in points (e.g., "Gap: 45 points")
- Priority badges (Critical/High/Moderate)
- Sorted by largest gap first

Performance Summary:

- Count of pillars with Excellent performance ($\geq 80\%$)
- Count of pillars with Good performance (60-79%)
- Count of Focus Areas ($< 60\%$)

Service Recommendations:

- Recommended services based on scores
- Service cards with descriptions

Step 3.2 - Test Export Functions

1. View PDF Button:

- Click "View PDF" or "Export PDF"
- Verify PDF downloads
- Open PDF and verify:
Page 1: Forvis Mazars logo at top
Page 1: Overall score displayed

Page 2: All 8 pillar bar charts with correct scores

Page 3: Gap analysis with priority badges

Page 3: Performance summary statistics

Page 4: Service recommendations

2. Email Results Button:

- Click "Email Results" or "Send to Email"
- Verify success message
- Check email inbox at jaredmoodley9@gmail.com
- Verify email received with:

Forvis Mazars logo in header

Overall score

PDF attachment

Professional formatting

Phase 4. Phase 4: User Dashboard (10 minutes)

Step 4.1 - Access User Dashboard

1. Navigate to User Dashboard (accessible after completing assessment)
2. Verify user details displayed:
 - Name: Test User
 - Email: jaredmoodley9@gmail.com
 - Company: Forvis Mazars Test

Step 4.2 - View Assessment History

1. Locate assessment history section
2. Verify your completed assessment is listed with:
 - Assessment type (CORE)
 - Overall score
 - Completion date
 - Status (Completed)

Step 4.3 - Test Dashboard Actions

1. View Assessment Details:

- Click on your assessment in the history
- Verify details modal/page opens
- Verify all 8 pillar scores displayed
- Verify scores match results page

2. Export PDF from Dashboard:

- Click "Export PDF" button on your assessment
- Verify PDF downloads
- Open and verify content matches previous PDF

Phase 5. Phase 5: Admin Dashboard Testing (15 minutes)

Step 5.1 - Admin Login

1. Navigate to admin login: <http://localhost:5173/admin>
2. Login with admin credentials
3. Verify admin dashboard loads

Step 5.2 - Find Your Test User

1. Navigate to Users section
2. Search for: jaredmoodley9@gmail.com or Test User

3. Verify your user account appears in results
4. Verify user details are correct

Step 5.3 - View User's Assessment

1. Click on your user account
2. Locate assessments list for this user
3. Verify your CORE assessment is listed
4. Verify overall score displayed

Step 5.4 - Admin PDF Export

1. Click "Export PDF" for your assessment from admin view
2. Verify PDF downloads
3. Open and verify:
 - Forvis Mazars logo at top
 - All 8 pillar scores match
 - Same content as user-downloaded PDF

Phase 6. Phase 6: Data Consistency Verification (10 minutes)

Step 6.1 - Cross-Reference All Scores

Compare pillar scores across all 4 locations:

Pillar Name	Results	User PDF	Admin PDF	Email PDF
Strategy & Leadership	___%	___%	___%	___%
Data Readiness	___%	___%	___%	___%
Technology & Infrastructure	___%	___%	___%	___%
Skills & Talent	___%	___%	___%	___%
Governance & Ethics	___%	___%	___%	___%
Security & Compliance	___%	___%	___%	___%
Culture & Change	___%	___%	___%	___%
Value & ROI	___%	___%	___%	___%

PASS CRITERIA: All scores must match exactly across all 4 sources

Step 6.2 - Verify Gap Analysis Consistency

1. Check gap analysis on results page - note which pillars are listed
2. Open PDF - verify same pillars listed in gap analysis section
3. Verify gaps calculated correctly (80% - pillar_score)
4. Verify priority badges match:
 - Critical if gap ≥ 40
 - High if gap ≥ 20
 - Moderate if gap < 20

Phase 7. Phase 7: Email Testing (10 minutes)

Step 7.1 - Check All Emails Received

Verify you received these emails at jaredmoodley9@gmail.com:

1. Welcome Email:

- Subject: "Welcome to SAFE-8 Assessment Platform"
- Forvis Mazars logo visible
- Professional formatting
- No broken images

2. Assessment Results Email:

- Subject includes your score (e.g., "Your SAFE-8 CORE Assessment Results - 78%")
- Forvis Mazars logo visible
- PDF attachment present
- Email body includes summary

Step 7.2 - Test Email PDF Attachment

1. Open the assessment results email
2. Download the PDF attachment
3. Verify PDF opens correctly
4. Verify all 4 pages present with complete data

Phase 8. Phase 8: Edge Cases & Error Handling (5 minutes)

Test 8.1 - Incomplete Assessment

1. Start a new assessment but don't complete it
2. Try to submit with missing answers
3. Verify validation prevents submission
4. Verify error messages are clear

Test 8.2 - PDF Generation Without Data

1. If possible, access an old assessment with empty dimension_scores
2. Try to download PDF
3. Verify PDF generates (even if empty sections)
4. Verify no errors/crashes

Test 8.3 - Multiple Assessments

1. Complete a second assessment with different scores
2. Verify both appear in user dashboard
3. Verify each has correct data
4. Verify PDFs are different

FINAL CHECKLIST

Core Functionality

- ☐ User registration works
- ☐ Assessment submission saves data
- ☐ Results display all 8 pillars with correct scores
- ☐ Overall score calculates correctly
- ☐ Gap analysis shows correct pillars and priorities
- ☐ Performance summary counts are accurate

PDF Generation (4 sources)

- ☐ Results page - "View PDF" works
- ☐ User dashboard - "Export PDF" works
- ☐ Admin dashboard - "Export PDF" works
- ☐ Email - PDF attachment works
- ☐ All 4 PDFs have identical data

PDF Content

- ☐ Forvis Mazars logo displays on page 1
- ☐ Page 1: Overall score and category
- ☐ Page 2: 8 pillar bar charts with correct scores
- ☐ Page 3: Gap analysis with priorities
- ☐ Page 3: Performance summary statistics
- ☐ Page 4: Service recommendations

Email Functionality

- ☐ Welcome email sends and displays logo
- ☐ Assessment results email sends
- ☐ Email logo displays (not broken)
- ☐ PDF attaches to email
- ☐ Professional formatting maintained

Data Consistency

- ☐ Frontend results match database
- ☐ PDF scores match frontend
- ☐ Admin view matches user view
- ☐ Email PDF matches downloaded PDF
- ☐ No simulated/fake scores

Branding

- ☐ Forvis Mazars logo in all PDFs
- ☐ Forvis Mazars logo in all emails
- ☐ Color scheme matches brand guidelines
- ☐ Professional appearance throughout

BUG REPORTING

If you find any issues, report with:

1. What you were doing: (e.g., "Clicking Export PDF from results page")
2. What you expected: (e.g., "PDF should download with all 8 pillars")
3. What actually happened: (e.g., "PDF only shows 3 pillars")
4. Screenshots: Attach if possible

5. Console errors: Open browser DevTools (F12) and check for red errors

SUCCESS CRITERIA

The app passes if:

- ☐ All 8 pillar scores display correctly everywhere
- ☐ All 4 PDF generation points produce identical output
- ☐ Logos display in PDFs and emails
- ☐ Gap analysis calculates correctly
- ☐ No "simulated" or random scores
- ☐ Data consistency across all views
- ☐ Professional branding maintained

QUICK START

1. Start the application:

```
# Terminal 1 - Backend  
cd c:\Projects\Audit\SAFE-8_Project\server  
npm run dev
```

```
# Terminal 2 - Frontend  
cd c:\Projects\Audit\SAFE-8_Project  
npm run dev
```

2. Open browser: <http://localhost:5173>

3. Follow Phase 1 and work through each phase systematically

4. Check off items as you test

5. Report any issues found

Good luck testing!