Story Analysis & Process Improvement

What works well?

- The title of the user story is clear and concise; it identifies:
  - the end user ("Investor")
  - and the expected functionality ("manage their profile information") of the feature.
- The functional specifications highlight the critical areas of the feature:
  - Sign In
  - Profile Access
  - Management of profile information
  - Sign Out
- The acceptance criteria is specific on what the user journey should be:
  - Sign in form is displayed
  - User is navigated to the correct screen
  - User is returned to the home screen
- The AC specified that there is "clear validation" and "helpful messaging" when providing information to the user

Clarity or Improvement

User Story Title

Create a secure and straightforward way for investors to manage their profile information.

- What is meant by secure?
  - 2FA
  - Session timeouts
  - Encryption
  - Rate-limiting
- What is meant by "straightforward"?
  - Vague wording with no specificity in the functional specs or AC

Functional Specifications

Sign In

- What credentials are used to sign in?
  - Email address
  - Username
  - User ID
- Is the sign in form multi-page or is it a single page form?
- Is 2FA being implemented?
- What is the password format?

- What errors are returned and how are they displayed?

Profile Access

- How does a user navigate to their profile?
- What is the URL path?

Information Updates

- What are the accepted phone number formats?
  - Country codes?
- How many phone numbers can be added?
  - Home
  - Work
  - Mobile
- What address fields are present?
- Is there a restriction on what addresses can be entered?
- Can multiple addresses be added?
- What is meant by "reliable saving"?
  - Is the save functionality automatic?
  - Is data only saved on-click?
  - Is there a confirmation when updates have been saved?
- What fields are mandatory?
- Are optional fields highlighted?

Sign Out

- Are users automatically logged out after a period of inactivity?

Acceptance Criteria

Sign In

- What does the sign in form look like?
  - Are there any designs?
  - Logo(s)
  - Button styles
- Specify correct formats and validation expectations for "valid user credentials"

Profile Access

- What is "clear field labelling"?
  - Do all fields have a title?
  - Is the title to the left of the field or is it contained within the field?
- Clear is subjective, could do with some information on what is expected

Information Updates

- What is "clear validation"?
    - How are validation expectations/formats displayed to the user?
    - When are validation exceptions flagged to the user?
    - How are validation expectations flagged to the user?
- What is "helpful messaging"?
    - When are these messages displayed?
    - What is the content of these messages?
    - Where are the messages displayed?

Sign Out

- What happens on sign out?
    - Are session tokens used and are these cleared on sign out?
- What is considered the home screen?
    - Sign in form?
    - Homepage of the website?
    - What is the path?

Assumptions to be verified

Create a secure and straightforward way for investors to manage their profile information.

- Everyone understands what is meant by "straightforward".
- "Secure" means industry-standard security practices.
- Users are accessing the feature via web or mobile.

Sign In

- The sign in form is on a page and not in a separate modal dropdown.
- The sign in form consists of username/email and password fields.
- Account lockout policies are in place.

Profile Access

- Only authenticated users can access the profile page and unauthorised users are displayed an error.
- The user is able to access their profile using a direct path such as a "Profile" menu item.

Information Updates

- International phone numbers are supported.
- Data persists and the user is notified when changes are saved.

Sign Out

- Session tokens are in use and are cleared on sign out.
- The "home screen" is the root page of the website.

Improvements

Security

I would seek clarity and understanding on what security measures are in place as the title of the user story specifically mentions "secure"; the feature is for a financial app and security is mentioned in the functional specs and AC. With this information, we would be able to focus testing on an area that is key to the feature.

- Will 2FA be used for sign in?
- Are session tokens being used?
- Is the sign in form protected against brute force and SQL injection attacks?
- Account lockouts
- Sanitising input data
- URL hacking by unauthorised users
- Limiting what information is displayed when an error occurs

Compatibility Expectations

I would like some more information around what the compatibility expectations are for this feature. With this information, we can ensure that we have the correct devices available for testing. This information could be specified in the acceptance criteria.

- Specifying if it is expected to work on desktop and mobile, or desktop only.
- What mobile devices should be tested on?
- Are tablets supported?
- Browsers
- Operating systems
- Desktop resolutions

Test Strategy Development

Title	Objective
Successful login into Investor Portal	The investor will be able to log in using a valid username and password.
Unsuccessful login into Investor Portal	The investor is prevented from logging in with invalid username and password
Sign out of Investor Portal	The investor will be able to sign out of the investor portal and be redirected to the home screen.
Access Profile as Authorised User	The authorised investor will be able to access their profile information by clicking on "Profile"
Access Profile as Unauthorised User	The unauthorised user is unable to access the "Profile" page via URL hacking
Update Profile	The investor can make changes to their profile and save those changes.
Update Profile with Invalid Email Address	The investor adds an invalid email address and saves, receiving an error.
Delete Phone Number	The investor deletes the content of the phone number field and saves.
Session Timeout is Working	The investor is signed out automatically after a period of inactivity.

Detailed Test Case

Update Profile

Title

Investor updates their name on their Profile

Setup Requirements

1. A review environment
2. A registered investor with a complete profile

Steps

GIVEN I am signed in as an Investor
AND I am on the Profile page
WHEN I update the name field to "Updated Name"
AND I click the "Save" button
THEN the "Name" field should display "Updated Name"
AND "Changes Saved" is displayed

Expected Results

The signed in user is able to update their name and the update persists when saved.

Success Metrics

1. The user is informed that their changes have been saved, tying in with the "helpful messaging" acceptance criteria.
2. Names with special characters can be entered and saved.
3. After saving, the updated name is displayed correctly.
4. The user cannot enter malicious inputs (SQL injection).
5. The user can update their name multiple times, with the data persisting.