

## College Capital Manual Testing Documentation (Sprint 3)

### Testing Threshold: 1 hour of testing = 4 manual tests

(Note: User should begin testing logged out of any current College Capital accounts)

(Note: Unless otherwise specified, User should always be logged in during testing)

**User Story 6 (1 Hour):** As a user, I would like to be able to split my account balance into multiple accounts.

#### Test Case 1

- System:
- Check to make sure that account balances can be split amongst multiple accounts.
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to \_\_ page
  - Click \_\_ and select an account to split, an amount, and an account to receive
- **Expected Result**
  - Funds within selected account to split should be redistributed to account selected to receive by the correct amount.

#### Test Case 2

- System:
- Check to make sure that account balance can be split into a newly created account
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to \_\_ page
  - Click \_\_ and select an account to split and an amount
  - Click \_\_ to create a new account to hold split account funds
- **Expected Result**
  - A new financial account should be created that holds the selected amount of funds from the split account.

#### Test Case 3

- System:
- Check to make sure Transactions that exceed a single accounts balance can be split amongst multiple accounts to meet the transaction amount

- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Create a new transaction whose amount exceeds that of the chosen financial account.
- **Expected Result**
  - User should be notified of the exceeding amount and prompted to select as many extra accounts to draw from as is necessary to complete the transaction.

#### Test Case 4

- System:
- Check to make sure that transactions whose amount exceeds ALL financial accounts are caught and will notify the user.
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Attempt to create a transaction whose amount exceeds ALL financial accounts
- **Expected Result**
  - User will be notified of their current lack of funds and transaction will not be created.

**User Story 10 (1 Hour): As a user, I would like to be able to visualize past spending habits.**

**Test Case 1**

- System:
- Check to make sure that user can choose a time frame to view their spending habits.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to \_\_ page
  - Attempt to view past spending within a time frame other than what is shown on the page
  
- **Expected Result**
  - Data on the graph will roll back/forward to the period chosen by the user

**Test Case 2**

- System:
- Check to make sure new transactions added to the “past” correctly update the relevant charts
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - The charts that correspond to the newly added transactions time frame should be correctly displayed.

**Test Case 3**

- System:
- Check to make sure that transactions in the “past” that are later modified are correctly updated in the relevant charts
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -

- **Expected Result**
  - The charts that correspond to the recently modified transactions time frame should be correctly displayed.

#### **Test Case 4**

- System:
- Check to make sure that visualization is visible and contains the correct information.
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to \_\_ page
- **Expected Result**
  - Page should display visualization of past spending habits with the correct information.

**User Story 12 (1 Hour):** As a user, I would like to be able to view a forecast of my current spending habits.

#### **Test Case 1**

- System:
- Check to make sure forecast chart displays correctly.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Forecast chart should be displayed based on relevant, recent financial information

#### **Test Case 2**

- System:
- Check to make sure that information regarding future spending is stored separately from current transaction information.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Any and all information that is specific to future spending forecasts should not directly interact with current financial information aside from inference.

#### **Test Case 3**

- System:
- Check to make sure that forecasts are only calculated with relevant, recent information.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**

- User should be able to specify a timeframe within which data for the forecast will be inferred, and only that data should be used in the forecast.

#### **Test Case 4**

- System:
- Check to make sure that any modifications to transactions that fall within the forecast's inference period will be reflected in the forecast.
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
- **Expected Result**
  - Forecast should reflect that changes to any transactions within the forecast's inference period

**User Story 18 (1 Hour):** As a user, I would like to be able to add my own, custom spending categories.

#### **Test Case 1**

- System:
- Check to make sure that newly created spending categories are correctly stored in the database.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Database should correctly store all newly created spending categories.

#### **Test Case 2**

- System:
- Check to make sure that newly created categories are specific to the user that created them and will always be accessible to the user (unless deleted).
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Users who create a new category should be the only ones able to access that category and will always be able to do so (unless deleted).

#### **Test Case 3**

- System:
- Check to make sure that categories created by a user can be deleted.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**

- Category should no longer be displayed, either on the page or in the database.

#### **Test Case 4**

- System:
- Check to make sure that only the user that created a new category can delete that category.
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
- **Expected Result**
  - Users should be unable to delete categories that they did not create themselves.



**User Story 19 (1 Hour):** As a user, I would like to be able to search my previous transactions.

#### **Test Case 1**

- System: Transaction.js
- Check to make sure that search function works as intended.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Use search function to search for a relevant transaction(s)
- **Expected Result**
  - Only transactions that match the search should be displayed.

#### **Test Case 2**

- System: Transactions.js
- Check to make sure that nothing is displayed if search function finds no matches.
- Severity: 3
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Use the search function to search for something that does not exist in the transaction table
- **Expected Result**
  - No transactions should be displayed.

#### **Test Case 3**

- System: Transactions.js
- Check to make sure that search function does not interfere with export function.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Use the search function such that only a subset of all the transaction are displayed
  - Attempt to export all transactions

- **Expected Result**
  - All transactions should be exported as usual, not just the searched subset.

#### **Test Case 4**

- System: Transactions.js
- Check to make sure sorting order is retained when searching.
- Severity: 3
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Use the search function such that only a subset (must be more than one) of all the transactions is displayed.
- **Expected Result**
  - Searched subset of transactions should retain the order in which they were previously sorted.

**User Story 21 (0.5 Hours):** As a user, I would like to be able to provide limits to specific spending categories.

#### **Test Case 1**

- System:
- Check to make sure spending limits are set correctly.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Spending limit should be correctly displayed.

#### **Test Case 2**

- System:
- Check to make sure that invalid input is not allowed.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Invalid input for spending limits (i.e. not numbers) will not be accepted.

**User Story 22 (1 Hour):** As a user, I would like to be able to receive alerts when I exceed my spending limitations.

#### **Test Case 1**

- System:
- Check to make sure that user is alerted when a transaction exceeds a set spending limit.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Attempt to create a transaction whose amount exceeds the set spending limit
  
- **Expected Result**
  - User will be notified of any transactions that would exceed a previously set spending limit with the information of that particular transaction.

#### **Test Case 2**

- System:
- Check to make sure that user is NOT alerted when a transaction does NOT exceed a set spending limit.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Attempt to create a Transaction whose amount is under the set spending limit
  
- **Expected Result**
  - User should not be notified if the transaction does not exceed the spending limit.

#### **Test Case 3**

- System:
- Check to make sure that any transactions created that exceed a set spending limit can be undone.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -

- **Expected Result**

- User should be able to undo any transactions created that exceed the set spending limit.

#### **Test Case 4**

- System:
- Check to make sure that notifications related to exceeded spending limits only trigger for the corresponding accounts.
- Severity:

- **Instructions**

- Go to [www.collegecap.org](http://www.collegecap.org)
- 

- **Expected Result**

- Any transactions that exceed a spending limit should only trigger a notification that corresponds to the account whose spending limit is exceeded.

**User Story 26 (1 Hour): As a user, I would like to be alerted of low account balances.**

**Test Case 1**

- System:
- Check to make sure user is notified of low account balances.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Create a transaction that brings at least one account below its low balance threshold
  
- **Expected Result**
  - User should be notified of low account balance.

**Test Case 2**

- System:
- Check to make sure user is NOT notified if account balance does not drop below low balance threshold.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Create a transaction that does NOT bring the corresponding account's balance below its low balance threshold
  
- **Expected Result**
  - User should NOT receive any notifications related to low account balances.

**Test Case 3**

- System:
- Check to make sure that low balance notifications should only be sent for accounts whose balance drops below its low balance threshold.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page

- Create a transaction that only brings one account below its respective low account balance.
- **Expected Result**
  - User should only receive a notification related to the balance whose low balance threshold was exceeded

#### **Test Case 4**

- System:
- Check to make sure that low balance notification contains all relevant information.
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Create a transaction that brings any account below its low balance threshold
- **Expected Result**
  - Notification that user receives should contain the relevant account, its current amount, and the account's low balance threshold.

**User Story 27 (1 Hour):** As a user, I would like to be alerted of large single transaction purchases.

**Test Case 1**

- System:
- Check to make sure user is notified of large single transactions.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Create a transaction whose amount exceeds the corresponding account's large single transaction threshold
  
- **Expected Result**
  - User should be notified of large single transaction

**Test Case 2**

- System:
- Check to make sure user is NOT notified if a transaction does not exceed any account's
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Create a transaction whose amount is under any account's large single transaction threshold
  
- **Expected Result**
  - User should not receive a large single transaction notification.

**Test Case 3**

- System:
- Check to make sure that large single transaction notifications should only be sent for accounts whose large single transaction threshold is exceeded.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Transactions page
  - Create a transaction whose amount only exceeds one account's large single transaction limit.



- **Expected Result**

- User should only receive a notification for the account whose large single transaction limit as exceeded.

#### **Test Case 4**

- System:
- Check to make sure that large single transaction notifications contain all the relevant information.
- Severity:

- **Instructions**

- Go to [www.collegecap.org](http://www.collegecap.org)
- Navigate to Transactions page
- Create a transaction whose amount exceeds any account's large single transaction limit

- **Expected Result**

- Notification that user receives should contain the relevant account, the amount of the large single transaction, and the account's large single transaction limit.

**User Story 28 (1 Hour):** As a user, I would like to be able to schedule regular expected payments.

**Test Case 1**

- System: Payments.js
- Check to make sure that scheduling functions correctly.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Payments page
  - Fill in appropriate fields with valid information then hit "Create"
- **Expected Result**
  - Scheduled transaction should be displayed below creation page.

**Test Case 2**

- System: PaymentFunc.js
- Check to make sure that scheduled transactions repeat on the correct interval.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Payments page
  - Fill in appropriate fields, preferably with a time that is very close to the current time
  - Wait until specified time has passed
- **Expected Result**
  - Scheduled payments should show up either on the same date for every month or on the same interval and should not disappear once the specified time has been reached.

**Test Case 3**

- System: Payments.js, PaymentFunc.js
- Check to make sure that scheduled transactions contain the correct, relevant information.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Payments page
  - Fill in appropriate fields with valid information then hit "Create"

- **Expected Result**
  - Scheduled transaction display should contain the title and amount of the transaction, as well as the scheduled date and time of the transaction

#### **Test Case 4**

- System: Payments.js, Transactions.js
- Check to make sure that recurring transactions are not redundantly added to the transaction table.
- Severity: 3
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Payments page
  - Fill in appropriate fields with valid information then hit "Create"
- **Expected Result**
  - Recurring transactions should not show up on the transaction table and should instead simply draw from the relevant account at the time of payment.

**User Story 29 (1 Hour):** As a user, I would like to be able to see spending suggestions based on my expenditures.

#### **Test Case 1**

- System:
- Check to make sure that users can indicate certain categories of spending as ESSENTIAL so as to be left out of spending suggestions.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Transaction categories indicated as ESSENTIAL will be left out of spending suggestions.

#### **Test Case 2**

- System:
- Check to make sure spending suggestion visualization displays correctly.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Spending suggestion visualization should display correctly with the relevant information.

#### **Test Case 3**

- System:
- Check to make sure that spending suggestion information is sensible and achievable.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**

- Spending suggestions generated by our algorithm should be based on well-researched statistics from trusted sources.

#### **Test Case 4**

- System:
- Check to make sure that new transactions added to an ESSENTIAL category do not modify spending suggestions.
- Severity:
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
- **Expected Result**
  - Spending suggestions should not change if a new transaction is added to a category marked as ESSENTIAL.

**User Story 43 (0.5 Hours): As a user, I would like to be able to input financial aid.**

**Test Case 1**

- System:
- Check to make sure that user can add support for financial aid.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Users should have the option create a special category specific to financial aid.

**Test Case 2**

- System:
- Check to make sure financial aid category funds function similarly to other funds.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - All funds within the financial aid category should have the same functionalities as funds in normal categories.

**User Story 44 (0.5 Hours):** As a student, I would like for my account totals to be adjusted properly after inputting financial aid.

#### **Test Case 1**

- System:
- Check to make sure that funds within the financial aid account are restricted to only be used on tuition unless tuition is already paid for.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - User should not be able use funds from the financial aid category for anything other than tuition unless tuition is already paid for.

#### **Test Case 2**

- System:
- Check to make that transactions for tuition always draw from financial aid before any other accounts.
- Severity:
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  -
  
- **Expected Result**
  - Any transaction created for tuition should draw funds from the financial aid account before drawing from any other accounts.

**User Story 46 (0.5 Hours): As a user, I would like to be able to view public financial information about companies I have invested in.**

#### **Test Case 1**

- System: Financials.js
- Check to make sure that user can use the page to search for companies and their relevant information.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Financials page
  - Enter a valid stock acronym into the input field
  - Click “GET STOCK SYMBOL” and search for a relevant stock
- **Expected Result**
  - The page should display information relevant to searched companies.

#### **Test Case 2**

- System: Financials.js
- Check to make sure that page loads with companies that user has already invested in.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Financials page
- **Expected Result**
  - Page should load with its initial contents displaying information specific to companies that the user has already invested in.



**User Story 61 (1 Hour): As a user, I would like to be able to login using a Gmail account.**

**Test Case 1**

- System: SignIn.js, google.js
- Check to make sure that user can log in with an existing Gmail account.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - If logged in, log out
  - Attempt to log in with an existing Gmail account
- **Expected Result**
  - User should be able to log in with an existing Gmail account.

**Test Case 2**

- System: SignIn.js, google.js
- Check to make sure that, when logging in with a Gmail account whose email address is already registered to collegecap.org, a new account will NOT be created.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - If logged in, log out
  - Attempt to log in using Gmail sign in with an account that is already registered to collegecap.org
- **Expected Result**
  - A new account should not be created, and user should be logged in to previously existing account.

**Test Case 3**

- System: SignIn.js, google.js
- Check to make sure that, when logging in with a Gmail account whose email address is NOT already registered to collegecap.org, a new account will be created.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - If logged in, log out

- Attempt to log in using Gmail log in with an account that is NOT already registered to collegecap.org
- **Expected Result**
  - A new account will be created.

#### Test Case 4

- System: SignIn.js, google.js
- Check to make sure that, when logging in with a Gmail account that does not exist, user will not be able to log in.
- Severity: 2
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - If logged in, log out
  - Attempt to log in using Gmail log in with a Gmail account that does not exist
- **Expected Result**
  - User should not be able to log in.

**User Story 62 (1 Hour): As a user, I would like to be able to cancel any unwanted transactions.**

**Test Case 1**

- System: PaymentFunc.js
- Check to make sure that scheduled transactions that have not yet been paid can be cancelled.
- Severity: 2
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Payments page
  - Delete an existing payment that has not currently in the process of being paid
  
- **Expected Result**
  - User should be able to cancel any transactions that are scheduled but have not yet been paid.

**Test Case 2**

- System: PaymentFunc.js
- Check to make sure the cancelled transactions are deleted from the database.
- Severity: 2
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Payments page
  - Delete an existing payment that has not currently in the process of being paid
  
- **Expected Result**
  - Transactions should not show up in the database after being cancelled.

**Test Case 3**

- System: PaymentFunc.js
- Check to make sure that funds spent for scheduled payments are not returned after deleting the payment
- Severity: 2
  
- **Instructions**
  - Go to [www.collegecap.org](http://www.collegecap.org)
  - Navigate to Payments page
  - Delete an existing payment that has already gone through at least once

- **Expected Result**
  - Funds for the deleted payment should not be returned

#### **Test Case 4**

- System: PaymentFunc.js
- Check to make sure that cancelled transactions are removed from the UI display.
- Severity: 2

- **Instructions**

- Go to [www.collegecap.org](http://www.collegecap.org)
- Navigate to Payments page
- Delete any existing, displayed payment

- **Expected Result**

- Cancelled payments should no longer be displayed on the page.