

Test Plan: PlanRadar Form Builder

1. Objective

To verify the functionality, permissions, field behaviors, and default values of PlanRadar Forms.

2. Scope

The following features will be tested:

- Form creation
- Field types of behavior
- Field permissions
- Default values
- Mandatory field validation

3. Test Scenarios + Test Cases

Preconditions: Have an account with valid email and password.

Scenario 1: Create a new form with multiple field types

Test Case	Steps	Expected Result	Actual Result
TC1.1 Add text field	<ol style="list-style-type: none"> 1. Go to forms and lists tab 2. Select forms and then press create a new form 3. Add text field 4. Save 	Field is created and visible in form	Field is created and visible in form
TC1.2 Add dropdown	<ol style="list-style-type: none"> 1. Go to forms and lists tab 2. Select forms and then press create a new form 3. Add Dropdown 4. Select default list 5. Save 	Dropdown appears and options are selectable	Dropdown appears and options are selectable
TC1.3 Add date field	<ol style="list-style-type: none"> 1. Go to forms and lists tab 2. Select forms and then press create a new form 3. Add Date 4. Save 	Calendar widget appears	Calendar widget appears
TC1.4 Save form	<ol style="list-style-type: none"> 1. Go to forms and lists tab 2. Select forms and then press create a new form 3. Add (Number, Assignee, Priority, Status) fields 4. Press save button 	Form is saved with all fields	Form is saved with all fields

Scenario 2: Test field permissions

Preconditions:

- Have an account with valid email and password.
- Create User Editor-Roll & User View-Only user accounts.

Test Case	Steps	Expected Result	Actual Result
TC2.1 Set view-only for role	<ol style="list-style-type: none">1. Go to forms and lists tab2. Select form3. Select title field4. Go to field permission in visible to: press add roles the select (User @ View-Only)5. Save	Field is visible but not editable	Field is visible but not editable
TC2.2 Set edit permission	<ol style="list-style-type: none">1. Go to forms and lists tab2. Select form3. Select title field4. Go to field permission in editable by: press add roles the select (User @ Editor-Roll)5. Save	Field can be edited	Field can be edited

Scenario 3: Test field permissions

Test Case	Steps	Expected Result	Actual Result
TC3.1 Add default value to text	<ol style="list-style-type: none">1. Go to forms and lists tab2. Select form3. Select title field4. Go to Default Title and write “The ticket title is:”5. Press save button	When form loads, title field shows “The ticket title is:”	When form loads, title field shows “The ticket title is:”
TC3.2 Date default = Today	<ol style="list-style-type: none">1. Go to forms and lists tab2. Select form	When form loads, Today's date is auto filled	When form loads, Today's date is auto filled

	<ol style="list-style-type: none"> 3. Select Need to be done before (Deadline) field 4. Go to Default date and select today's date 5. Press save button 		
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Scenario 4: Mandatory field validation

Test Case	Steps	Expected Result	Actual Result
TC4.1 Mandatory dropdown	<ol style="list-style-type: none"> 1. Go to forms and lists tab 2. Select form 3. Press on Type of work field and then select mandatory box 4. Press Save button 5. Go to tickets tab and the press create ticket button 6. On form field select the form we just add or edit 7. Press save button 	Error message appears: You have not filled in all the required fields	Error message appears: You have not filled in all the required fields

The automation script for scenario 4

What the script does:

1. Login
2. Go to Tickets tab
3. Press the Create ticket button
4. Try submitting without entering data
5. Verify error messages appear

GitHub Test Script link for scenario number 4:

[Automation Test Script](#)

4. Documentation

Steps Taken:

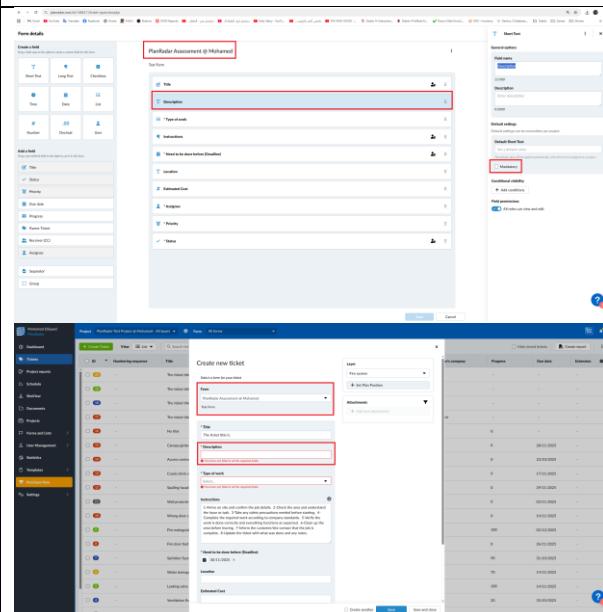
- Created a new demo account.
- Navigated to Forms.
- Reviewed knowledge base articles.
- Create a new form inside the default project.
- Added text, dropdown, and date fields.
- Configured permissions for two roles.
- Tested default values (text + date).
- Tested mandatory validation.

Observations:

- Field types work correctly.
- Dropdown options were rendered properly.
- Permissions were applied (View Only role could not edit fields).
- Default values populated automatically.

- Mandatory validation prevented submission.

5. Bugs Found

ID number	#1
Name	Description field shows validation error message
Reporter	Mohamed ElSayed
Submit Date	11/15/2025
Summary	When trying to create a new ticket and press save button error message appears under Description field, while it is NOT a mandatory field.
URL	https://www.planradar.com/dr/1484311/1484312/defects/21a7f12c-24af-4b3b-8682-d14a80b63678/details
Screenshot	 A screenshot of the PlanRadar software interface. The top window is titled 'Create ticket' and shows a form with several fields. The 'Description' field has a red border around its input area, indicating an error. The bottom window is a list of tasks or tickets, showing a single item with a red border around its row, likely indicating it's selected or highlighted.
Platform	Windows 10 x64-bit

Operating System	Edition Windows 10 Pro Version 22H2 OS Build 19045.6466
Browser	Chrome Version 142.0.7444.136 (Official Build) (64-bit)
Severity	Major
Assigned to	/
Priority	High

Description

When trying to create a new ticket and press save button error message appears under Description field, while it is NOT a mandatory field

Steps to reproduce

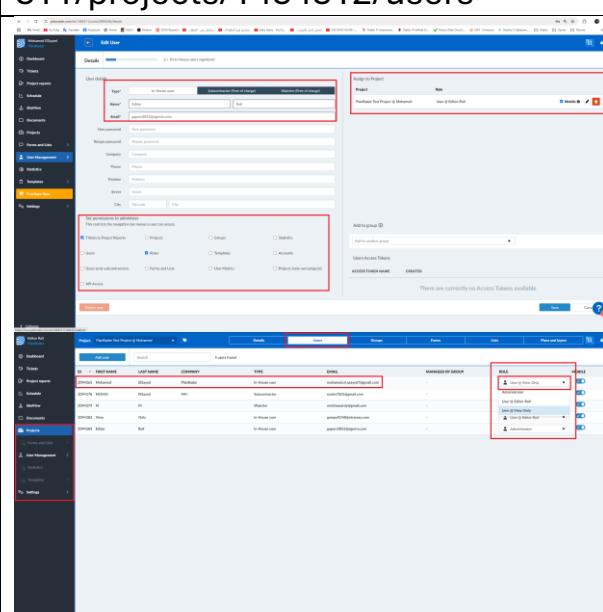
- > Go to tickets tab
- > Press creates new ticket button
- > On form field select “PlanRadar Assessment @ Mohamed “form
- >Press save button
- >Error massage “You have not filled in all the required fields. “Appears under description field (see screenshot)

Expected result

NO error massage appearing under description field after pressing the save button

Actual result

Error message “You have not filled in all the required fields. “Appears under description field

ID number	#2
Name	Administrator account role bug
Reporter	Mohamed ElSayed
Submit Date	11/15/2025
Summary	Any user with any permissions can change the administrator role in the projects.
URL	https://www.planradar.com/dr/1484311/projects/1484312/users
Screenshot	
Platform	Windows 10 x64-bit
Operating System	Edition Windows 10 Pro Version 22H2 OS Build 19045.6466
Browser	Chrome Version 142.0.7444.136 (Official Build) (64-bit)
Severity	Critical

Assigned to	/
Priority	High

Description

Any user with any permissions can change the administrator role in the projects

Steps to reproduce

- > Login with any (In-house) user account
- > Go to projects page then select our project
- > Go to user's tab and press the roll column for the administrator user account
- > Change the roll from administrator to any another roll (see screenshot)
- > The system saves and applies the changes (see screenshot)

Expected result

Any user accounts other than the administrator user can NOT change the roll for the administrator account

Actual result

Any user accounts other than the administrator user CAN change the roll for the administrator account

6. Recommendations for Improvements

1. Add real-time validation: Show mandatory field errors instantly, not after submitting.
2. Add bulk field creation templates (multiple selection at the same time): Speeds up form creation.
3. Add “Test Form” mode: Allow QA or admins to simulate different roles without logging out.

4. Improve the form UI&UX design: make it more user friendly and easy to use.

5. Add more automated info about the form, like: form creator name and form creation day.