
ProProsper Interactive Test Scenarios

IT-02: Test ProProsper General Functions

December 2, 1996
proprosper_it_02.doc

Tester's Name: _____

Hardware: _____

Date Tested: _____

Ernst & Young LLP

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Interactive Test IT-02: Test ProProsper General Functions

Purpose

The purpose of this test package is to provide instructions and recording materials for each person participating in the interface testing of Ernst & Young's ProProsper application for Windows. This test package is written for all users who have access to the ProProsper application.

This package will test the interaction of general system functions of the ProProsper application on platforms running the Windows 95 operating system.

General Instructions

Please take the time to look through this test package before beginning the test. Ensure that it contains all the test scripts mentioned in the Contents. Unless the Test Administrator tells you otherwise, follow the test scripts in the order in which they are presented in this test package.

It is assumed that ProProsper has been installed in accordance with test package ET-01: *Test ProProsper Installation*. If ProProsper has not been installed on the system you will use to perform these tests, do so prior to beginning.

Generally, these test instructions are written for mouse use. If your mouse is set for the right hand, click the left mouse button once to open a menu, to initiate a menu command, to initiate a command button or to initiate an icon button command; double-click (click twice in rapid succession) on the left mouse button to select an item and to initiate its associated action. If your mouse is set for the left hand, click the right mouse button right mouse button once to open a menu, to initiate a menu command, to initiate a command button, or to initiate an icon button command; double-click on the right mouse button to select an item and to initiate its associated action.

Sometimes a step will include both mouse and keyboard instructions. When indicated, several testers should follow mouse instructions; and several other testers should follow keyboard instructions during these test scripts.

List boxes contain multiple rows of information. Most list boxes display a highlighted row when you first access them. This is the system default. To accept the system default, simply click on the appropriate command button (usually **OK**) to initiate the action you want. To change the system default, simply click on another row. From any list box without a default row, you need to click on a row to select it. Then, click on the command button you want in order to initiate its associated action. In all list boxes, you should be able to double-click on a row to select it and to initiate the default command (usually **OK**) associated with the window, tab, or dialog box. (Default command buttons appear with a heavier black border around them. Default buttons allow you to initiate the default command by pressing **Enter**.)

Conventions

For these test scenarios, you will be instructed to “click” or to “double-click” your mouse.

All menu names, menu commands, and windows controls are identified as such and appear in **Arial Bold** typeface.

Menu commands appear in the format of “**File> Print menu command**”, which indicates that this is a command on the **File** pull-down menu name. The instruction reads: “Click on the **File> Print menu command.**” You click once on the **File** menu. The **File** menu opens. You click once on the **Print** command located on the **File** menu. The system initiates the action associated with the **Print** menu command; in this instance, it opens the Print dialog box.

By definition, all system-populated fields are required fields. When you access a window or dialog box for the first time and a text box contains a value, or a row is highlighted, or an option button is selected, or a check box is selected, that value is the system default. You cannot delete a system default; you must either accept the default or change it.

Preparation

Please ensure that you print your name, title, the date you perform the test, and the type of hardware the test was performed on for each test script or subscript. (Different evaluators or developers may look at separate pieces of your test scenario and may need to contact you for additional information.)

Please ensure that the test evaluators can read any comments you make. (Ball-point pens with blue ink are recommended.) If you need additional space for comments, use the back of the page and number the continuing comment with the appropriate step number. Or, fill out a [name of bug tracking control document].

If you discover a bug, try to reproduce it. Write down the steps you took that will let us reproduce the condition under which the bug occurred. If you consider a feature to be overly complicated or if you think of enhancements that would benefit the end users in performing tasks associated with Proper 2.0, please provide a detailed account of the problem you encountered or the enhancement you recommend. When creating a [name of bug tracking control document] or making any comments concerning the ProProsper application, please provide the name of the associated window or dialog box, menu, etc.

What's In This Package

[Name of bug tracking control document] — for recording observations about the system in addition to any information you may provide in the Comments column. If you need to provide a [name of bug tracking control document], we suggest that you indicate so in the Comments column for the particular step associated with the [name of bug tracking control document].

Testing scripts and subscripts — a sequence of instructions and expected responses for this test scenario. Each step in a script or subscript has an associated column for you to mark a status of either pass or fail and for you to provide additional comments, as necessary. Please test each script or subscript in the order defined in the remainder of this document.

Importing and Exporting Data

Step	User Action	Expected Response	P	F	Comments
1.	Copy the file TESTER.QIF to the DATA directory under the directory in which Proper is installed.				
2.	From the Menu Bar, select the F ile menu.	The F ile menu appears.			
3.	Select the I mport... menu item under the F ile menu.	The Open dialog box appears. The File name field defaults to *.QIF.			
4.	Click on the file TESTER.QIF.				
5.	Click the O K button.				Still cannot successfully import QIF files from Quicken. Get error on input dialog box. Dialog then appears indicating that data has been imported. No data appears in ProProsper however.
6.					
7.					
8.					
9.	Click the O K button.	The Import From dialog box closes and the Import From QIF File dialog box appears.			
10.	Click the S elect .QIF Files button.	The Open dialog box appears.			
11.	Ensure that the File Name: field reads *.qif.				
12.	Click the C ancel button.	The Open dialog closes.			

Step	User Action	Expected Response	P	F	Comments
13.	Click the C ancel button on the Import From QIF File dialog box.	The Import From QIF File dialog box closes.			
14.					
15.					
16.					
17.					
18.	From the Menu Bar, select the F ile menu.	The F ile menu appears.			
19.	Select the E xport... menu item under the F ile menu.	The Export dialog box appears.			
20.	Ensure that the Portfolio Security Prices radio button is selected.				
21.	Click the O K button.	The Export dialog box closes and the Save As dialog box appears.			
22.	Enter QUOTES1 in the File name field.				
23.	Click the S ave button.	An Information message box will appear indicating that the information has been successfully exported to the file.			
24.	Click the O K button.	You are returned to the ProProsper application desktop.			
25.	From the Menu Bar, select the F ile menu.	The F ile menu appears.			
26.	Select the E xport... menu item under the F ile menu.	The Export dialog box appears.			
27.	Click the T urbo Tax (TXF) radio button so that it is selected.	The Portfolio Security Prices radio button is deselected			

Step	User Action	Expected Response	P	F	Comments
28.	Click the OK button.	A Tax Report Date Range dialog box appears.			
29.	Click the From: pull-down.	The Start date pull-down opens revealing a calendar.			
30.	Use the month pull-down to select the month <i>January</i> .				
31.	Use the year spin box to select the year 1996.				
32.	Click on the 1 st date (Monday the 1 st).	The Start date pull-down closes and indicates the date of 01/01/1996.			
33.	Click the To: pull-down.	The Start date pull-down opens revealing a calendar.			
34.	Use the month pull-down to select the month <i>December</i> .				
35.	Use the year spin box to select the year 1996.				
36.	Click on the 31 st date (Tuesday the 31 st).	The Start date pull-down closes and indicates the date of 12/31/1996.			
37.	Click the OK button.	A Save As dialog box appears.			
38.	Enter TTAX in the File name field.				
39.	Click the Save button.	An Information message box will appear indicating that the information has been successfully exported to the file.			
40.	Click the OK button.	You are returned to the ProProsper application desktop.			

Step	User Action	Expected Response	P	F	Comments
41.	Launch WordPad using Start>Programs>Accessories>WordPad.				
42.	In WordPad, click the F ile menu.	The F ile menu opens.			
43.	Select the O pen... menu item.	The Open dialog box appears.			
44.	Locate the directory C:\INSTALL1 using the Look in: field.				
45.	Select All Documents (*.*) in the Files of type: pull-down.				
46.	Double-click on the file quotes1.txt.	The file opens. You can see any quotes information from the export within this file.			
47.	In WordPad, click the F ile menu.	The F ile menu opens.			
48.	Select the O pen... menu item.	The Open dialog box appears.			
49.	Locate the directory C:\INSTALL1 using the Look in: field.				
50.	Select All Documents (*.*) in the Files of type: pull-down.				
51.	Double-click on the file TTAX.txf.	The file opens. You can see any quotes information from the export within this file.			
52.	Double-click on the control menu of WordPad.	WordPad closes.			

Print Preview, and Print Setup

Step	User Action	Expected Response	P	F	Comments
1.	From the Menu Bar, select the F ile menu.	The F ile menu appears.			
2.	Select the O pen... menu item under the F ile menu.	The Open dialog box appears.			
3.	Select the file TESTONE.PTX from the File name: list box.				
4.	Click the O pen button.	The plan opens. The ProProsper Navigator is displayed.			
5.	From the Menu Bar, select the T ools menu.	The T ools menu appears.			
6.	Select the I ncome Tax Estimator menu item from the Tools menu.	The Income Tax Estimator form opens.			
7.	From the Menu Bar, select the F ile menu.	The F ile menu appears.			
8.	Select the P rint P review menu item under the F ile menu.	The print preview form appears showing a page with some information on it.			
9.	Move your cursor over the displayed page.	The cursor takes the shape of a magnifying glass.			
10.	Click the right mouse button once.	A zoom occurs so that the page appears closer.			
11.	Click the right mouse button again.	A zoom occurs so that the page appears closer. The mouse cursor returns to its standard cursor shape.			

Step	User Action	Expected Response	P	F	Comments
12.	Click the right mouse button once.	A zoom out occurs so that the page appears as it did in step 12.			
13.	Click the Zoom In button.	A zoom occurs so that the page appears closer.			
14.	Click the Zoom In button.	A zoom occurs so that the page appears closer.			
15.	Click the Zoom Out button.	A zoom out occurs so that the page appears as it did in step 12.			
16.	Click the Next Page button.	The second page of the material to be printed is displayed.			
17.	Click the Prey Page button.	The first page of the material to be printed is displayed.			
18.	Click the Two Page button.	Both pages of material to be printed are displayed side by side. The Two Page button becomes a One Page button.			
19.	Click the One Page button.	One page of material to be printed is now displayed. The One Page button becomes a Two Page button.			
20.	Click the Print... button.	The Print dialog box appears.			
21.	Click the OK button.	The file prints to the local printer. If the file does not print to the local printer, consult your system administrator to determine the cause of the print failure.			

Step	User Action	Expected Response	P	F	Comments
22.	<p>Inspect the printed document to ensure that it appears properly formatted. (Do not inspect for data integrity.)</p> <p>It is unnecessary to test any other aspect of the Print dialog since it is related to the printer drivers associated with the specific printer and Windows 95.</p>				
23.	From the Menu Bar, select the F ile menu.	The F ile menu appears.			
24.	Select the P rint P review menu item under the F ile menu.	The print preview form appears showing a page with some information on it.			
25.	Click the C lose button.	The Print Preview form closes.			
26.	Select the P rint S etup... menu item under the F ile menu.	The Print Setup dialog box for the default printer attached to your system appears.			
27.	<p>Click the Cancel button.</p> <p>It is unnecessary to test any other aspect of the Print Setup dialog since it is related to the printer drivers associated with the specific printer and Windows 95.</p>	The Print Setup dialog box closes.			
28.	Double-click on the control menu to close the Income Tax Estimator form.	The Income Tax Estimator form closes.			

Printing Data

The following test procedure should be performed for each form which contains printable data. Use the first table show below (Forms to Test) to determine all forms to test. Perform the test procedure from the second table (Form Print Test) to test each form. When you have tested the form, check the P or F column of the first table (Forms to Test) as applicable.

Forms to Test

Step	User Action	Expected Response	P	F	Comments
1.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
2.	Click on the B alance Sheet menu item.	The Financial Plan Summary form opens.			
3.	Test form in accordance with the Form Print Test table which follows this table.				
4.	From the form, double-click on the Control-menu box.	The Financial Plan Summary form closes.			
5.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
6.	Click on the B udget menu item. (If nothing happens here do the following: a. Perform steps 1 and 2 b. Click the Budget panel so that the Budget panel is displayed.	The Balance Sheet & Budget form opens.			
7.	Test form in accordance with the Form Print Test table which follows this table.				
8.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
9.	Click on the G oals menu item.	The Goals form opens.			
10.	Test form in accordance with the Form Print Test table which follows this table.				

Step	User Action	Expected Response	P	F	Comments
11.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
12.	Click on the C alculator menu item.	The Calculator opens. There is no need to test the menu functions of the Calculator since it is a Windows 95 native tool.			
13.	From the calculator window, double-click on the Control-menu box.	The Calculator closes.			
14.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
15.	Click on the 401(k) Plan menu command.	The 401(k) form opens.			
16.	Test form in accordance with the Form Print Test table which follows this table.				
17.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
18.	Click on the 403(b) Plan menu command.	A dialog appears which cannot be printed.			
19.	Click the OK button.	The dialog closes.			
20.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
21.	Click on the Buy vs. Rent A Home menu command.	The Buy vs. Rent A Home form opens.			
22.	Test form in accordance with the Form Print Test table which follows this table.				
23.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
24.	Click on the Disability menu command.	The Disability form opens.			

Step	User Action	Expected Response	P	F	Comments
25.	Test form in accordance with the Form Print Test table which follows this table.				
26.	From the Menu Bar, click on the T<u>o</u>ols menu.	The T<u>o</u>ols menu opens.			
27.	Click on the Estate T<u>a</u>x menu command.	The Estate form opens.			
28.	Test form in accordance with the Form Print Test table which follows this table.				
29.	From the Menu Bar, click on the T<u>o</u>ols menu.	The T<u>o</u>ols menu opens.			
30.	Click on the I<u>n</u>come Tax Estimator menu command.	The Income Tax Estimator form opens.			
31.	Test form in accordance with the Form Print Test table which follows this table.				
32.	From the Menu Bar, click on the T<u>o</u>ols menu.	The T<u>o</u>ols menu opens.			
33.	Click on the L<u>e</u>ase vs. B<u>u</u>y a C<u>a</u>r menu command.	The Lease vs. Buy a Car form opens.			
34.	Test form in accordance with the Form Print Test table which follows this table.				
35.	From the Menu Bar, click on the T<u>o</u>ols menu.	The T<u>o</u>ols menu opens.			
36.	Click on the L<u>i</u>fe I<u>n</u>surance menu command.	The Life Insurance form opens.			
37.	Test form in accordance with the Form Print Test table which follows this table.				

Step	User Action	Expected Response	P	F	Comments
38.	From the Menu Bar, click on the <u>T</u>ools menu.	The <u>T</u>ools menu opens.			
39.	Click on the <u>L</u>oan menu command.	The Loan Calculator form opens.			
40.	Test form in accordance with the Form Print Test table which follows this table.				
41.	From the Menu Bar, click on the <u>T</u>ools menu.	The <u>T</u>ools menu opens.			
42.	Click on the <u>P</u>ension menu command.	The Pension form opens.			
43.	Test form in accordance with the Form Print Test table which follows this table.				
44.	From the Menu Bar, click on the <u>T</u>ools menu.	The <u>T</u>ools menu opens.			
45.	Click on the <u>R</u>efinance menu command.	The Refinance form opens.			
46.	Test form in accordance with the Form Print Test table which follows this table.				
47.	From the Menu Bar, click on the <u>T</u>ools menu.	The <u>T</u>ools menu opens.			
48.	Click on the <u>T</u>axable vs. Tax Deferred menu command.	The Taxable (vs) Tax-Deferred form opens.			
49.	Test form in accordance with the Form Print Test table which follows this table.				
50.	From the Menu Bar, click on the <u>T</u>ools menu.	The <u>T</u>ools menu opens.			
51.	Click on the Time Value of <u>M</u>oney menu command.	The Time Value Money form opens.			

Step	User Action	Expected Response	P	F	Comments
52.	Test form in accordance with the Form Print Test table which follows this table.				
53.	From the Menu Bar, click on the T ools menu.	The T ools menu opens.			
54.	Click on the W-4 Exemptions menu command.	The W-4 Exemptions form opens.			
55.	Test form in accordance with the Form Print Test table which follows this table.				
56.	From the Menu Bar, click on the P ortfolio menu.	The P ortfolio menu opens.			
57.	From the P ortfolio menu, click on the P ortfolio Manager menu command.	The Portfolio Manager form opens.			
58.	Test form in accordance with the Form Print Test table which follows this table.				

Form Print Test

Step	User Action	Expected Response	P	F	Comments
1.	Open selected form from previous table (Forms to Test).	Applicable form opens.			
2.	Select the Print menu item under the File menu.	The Print dialog box appears.			
3.	Click the OK button.	The file prints to the local printer. If the file does not print to the local printer, consult your system administrator to determine the cause of the print failure.			
4.	Inspect the printed document to ensure that it appears properly formatted. (Do not inspect for data integrity.) It is unnecessary to test any other aspect of the Print dialog since it is related to the printer drivers associated with the specific printer and Windows 95.				
5.	Double-click on the control menu to close the applicable form.	The form closes.			

Access Help Engine and About Function

Step	User Action	Expected Response	P	F	Comments
1.	From the Menu Bar, click on the H elp menu.	The H elp menu opens.			
2.	Select the H elp T opics menu item under the H elp menu.	The on-line help system launches and the table of contents help for the ProProsper application is displayed.			
3.	Double-click on the on-line help window control menu.	The on-line help system closes.			
4.	Select the A bout P ro P rosper menu item under the H elp menu.	A dialog box appears indicating the current version of the ProProsper application that you are running.			
5.	Click the O K button.	The dialog box closes.			

Access Context-Sensitive Help

The following test procedure should be performed for each form and dialog available in ProProsper. Apart from the installation routine (which does not contain any on-line help), each form, dialog, and menu contains context-sensitive help which will load when the **F1** key is pressed. The following table will guide you to each menu item and dialog. When a step instructs you to “test help,” do the following:

1. Press **F1**.
2. Ensure that the help which appears relates to the form, dialog, or menu item.
3. Double-click the help engine control menu to close help.
4. Press **Tab** to move to the next field or control.
5. Repeat steps 1 through 4 until all fields and controls on the form or dialog have been tested.
6. Move to the next step in the table.

Step	User Action	Expected Response	P	F	Comments
1.	Double-click on the ProProsper application control menu.	The ProProsper application closes.			
2.	From the Start Menu, click on the ProProsper application icon under Programs> ProProsper Test> .	The ProProsper application window opens. The ProProsper splash screen occupies the center of the application window.			
3.	Click anywhere on the ProProsper application.	The ProProsper splash screen closes. The Welcome to ProProsper dialog box appears.			

Step	User Action	Expected Response	P	F	Comments
4.	Perform the following steps to every form dialog and control in the ProProsper application. In addition, perform these steps with every possible menu/menu item activated (i.e., when a menu is open and/or a menu item is highlighted prior to activation). In no instance should an error message occur. In no instance should an invalid or unrelated topic be found.				
5.	Press the F1 key.				
6.	Ensure that a help topic which is related to the currently selected function appears.				
7.	Close the help engine by double-clicking on its control menu.				
8.	Press the Tab key to move to the next control, field, or item.				
9.	Return to step 5 until all dialogs and forms have been tested.				

This completes interactive test IT-02. Proceed to interactive test scenario IT-03 to continue testing the ProProsper application.