# Performing exploratory testing with Xray

- Overview
- Process at a glance
  Exploratory testing y
  - Exploratory testing with Xray
    - Using Xray built-in capabilities
      - Defining an exploratory Test and its charter with Xray
      - Performing the test session (i.e., "executing" the test)
      - Using Kray together with Xray Exploratory App
        - Starting an exploratory testing session for an existent Test in Xray
          - Starting the session from Xray
          - Starting the session directly from XEA
        - Create a new exploratory test using XEA and report results to Jira and Xray

## Overview

Exploratory testing is an approach for testing where the testers plays a key role in uncovering problems that otherwise could stay unnoticed.

While exploring, testers perform test ideas by interacting with the target system, from where they observe and get insights for further test ideas.

Therefore, there's no predefined script for the tests. What we do is dynamic, based on real-time feedback we get from the system, together with our knowledge and context that are key to identifying problems and gaps in our systems.

Learn more here.

## Process at a glance

In exploratory testing, usually we start with a goal, or a so called **charter**. The charter is a high-level description of what we aim to test and the why, for the purpose of the time we decide to allocate to it.

Sometimes, our testing sessions, where we perform the actual testing, may be well-delimited (e.g., 30min sessions), or may not have an exact time frame.

During our session, we take notes and other evidence (e.g., screenshots, videos, logs) that we can then **share** and **debrief** with the team afterwards. We may even report defects or create new ideas in the backlog.

## Exploratory testing with Xray

First, we need to use some entity as an abstraction of an exploratory test. In fact, exploratory tests are... tests. Therefore, we will use Test issues for this purpose.

By default, in Xray we have different types of Tests, including "Manual" (i.e. scripted, composed of well-known predefined steps), Cucumber (i.e. Gherkin), and Generic (i.e., unstructured tests).

For defining our test charter, we'll use unscructured tests; we can either use Tests of "Generic" test type or even, probably better, create a specific test type and name it, for example, "Exploratory".

In sum, an exploratory test in Xray will be a Test. A testing session, that represents the testing performed for a given charter, will be abstracted as a Test Run for the exploratory Test.

Exploratory Testing (ET) concept	Xray concept
Test / Test charter	<ul> <li>Test</li> <li>Unstructured (e.g., "Generic" or custom test type such as "Exploratory")</li> <li>Charter can be set on the <b>Definition</b> field</li> </ul>
Session	Test Run

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### Using Xray built-in capabilities

To perform exploratory testing, as seen earlier, we just need to use Tests (either of Generic type or of a specific custom type such as Exploratory).

The process would be similar to how we manage "manual"/scripted test cases:

- 1. define the Test
- 2. link it to some story or requirement, generally speaking
- 3. organize it in a Test Repository folder or add it to some Test Set kind of list
- 4. add it to some Test Plan
- 5. "execute" it

The steps 2-4, even though optional, are common.

Let's focus our attention on defining the Test and then on the "execution" (i.e., the actual testing session).

#### Defining an exploratory Test and its charter with Xray

To define an exploratory test, the process is similar to the creation of typical Test in Xray, with some subtle nuances.

- 1. Create an exploratory Test issue
  - a. for the Summary, use a name that summarizes the test charter
  - b. choose the proper test type, as mentioned earlier
  - c. fill out the "Definition" field, with the test charter

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### Performing the test session (i.e., "executing" the test)

Before performing our test session, we need to schedule an execution for our Test. The way to do this in Xray, is to schedule a Test Execution for our Test (or to include our Test in an existing Test Execution).

Test Executions can be created from multiple places (e.g., from Test Repository, Test Plan, etc), including directly from the Test issue screen.

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Execute with Exploratory App Import Execution Results

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### Using Xray together with Xray Exploratory App

The Xray Exploratory App (XEA) is a side companion desktop app that is used to assist testers on exploratory testing related tasks.

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C	Video
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<ul> <li>Report</li> </ul>	results to Jira, using Xray
c	Notes
C	Screenshots
c	Track impacts on related requirements

To be able to use Xray Exploratory App, please see its Getting Started documentation that details the installation and configuration process.

Concerning the integration with Xray, there are two main flows to have in mind:

- 1. define the test charter in Xray, by creating an exploratory Test, and then use XEA to assist on note-taking and report results back to Jira, where the team can analyze them and track its impacts
- 2. use XEA to define the test charter, assist on note and evidence taking during testing, and then report results back to Jira, where the team can analyze them and track its impacts

The subtle difference is which tool we'll use to create/define the exploratory Tests. Teams may use the first approach, where Xray is the master, if they wish to follow similar processes as they do for manual scripted test cases, and have some sort of management/planning.

#### Starting an exploratory testing session for an existent Test in Xray

In this scenario, we're considering that an exploratory test and its charter have already been defined and exists in Xray.

The exploratory test may have been created in Xray (see above instructions on how to use Xray for defining exploratory tests) or by Xray Exploratory App on a previous session (please see information ahead on how to use Xray Exploratory App to create Tests).

Having the Test, how can we start our testing session and use XEA to assist us?

We can either start the session right from Xray, or directly from XEA.

#### Starting the session from Xray

To start a session from Xray, we need first to schedule a execution for our test by creating a Test Execution with it, or adding it to an existing Test Execution and then use the option to execute it using Xray Exploratory App from the test run details screen.

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Then start your session.

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🔶 Xray

First, you need to select the screen/application you wish to record (in case you aim to take screenshots or record videos).



We can then perform exploratory testing and use Xray Exploratory App to assist us during the process. In the end, results can be uploaded to Xray to the original Test Execution created in Xray, being associated with the corresponding Test Run of the exploratory Test.

While exploring your target app/system, use Xray Exploratory App to:	

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After finishing exploring, end your session, review it, choose properly the test status you aim to report, and choose the option to upload the results to Xray and Jira (i.e., "Submit Test Run").



Please see Xray Exploratory App's documentation for more information on executing exploratory testing sessions and all the available options.

#### Starting the session directly from XEA

Assuming Xray Exploratory App is installed and the connection to the Jira/Xray instance have been configured, we just need to start Xray Exploratory App and choose "New Session for Existent Test".

Then we need to select the Jira project where we have our Test, and then identify it by its issue key. Then we just need to load it and start our testing session.

Xray Exploratory App - line yray-demo3 detyray app	Xray Exploratory App - lize: yray-damo3 detyray app
Aray Exploratory App • Jira: xray-demos.getxray.app	Aray Exploratory App + Jira: xray-demos.getxray.app
	SELECT A TEST ISSUE
	Project CALC - CALC
	Search tests
	Search by summary text or complete issue key
	Recently undeted
	o CALC-262
	security on login page
XRAY Tort Management	CALC-225
rest Management	CALC-253
New Session	dummy
	CALC-41
New Session for Existing Test	CALC-104
Open Saved Session	manual login test
Go to Jira Instance	CALC-226
1	CALC-244
	Close Load Test
Test Timeline	
Project	
Test Key	
CALC-262	
Summary*	
Priority	
Trivial	
00:00:00 Set a time limit for your test session	
Test type	
Chadar (Inst definition)	
Explore the login page	
Using Chrome and valid and invalid logins To discover problems with security	
Test execution*	
Ad-hoc test execution V	
Start session	

We can then perform exploratory testing and use Xray Exploratory App to assist us during the process. In the end, results can be uploaded to Xray to a newly created Test Execution having the Test we selected along with its result (i.e., the corresponding Test Run).

Please see Xray Exploratory App's documentation for more information on executing exploratory testing sessions and all the available options.

### Create a new exploratory test using XEA and report results to Jira and Xray

Remaining time 00:00:00

🔶 Xray

Elapsed time 00:00:00 Assuming Xray Exploratory App is installed and the connection to the Jira/Xray instance have been configured, we just need to start Xray Exploratory App and choose "New Session".

	Yray Exploratory App + Jira: yray-demo3 detyray app
	YDAY
	Test Management
	New Session
	New Session for Existing Test
	Open Saved Session
	Go to Jira Instance
- R.	
-	

Then we need to select the Jira project where we aim to create our Test on, along with some additional information:

- Summary: for a brief summary of our test charter
  Test Type: make sure to select the proper you will be using as an abstraction of exploratory tests (e.g., "Exploratory", "Generic")
  Charter: the test charter

🗧 🔵 🔵 Xray Exploratory App • Jira: xray-demo3.getxray.app		
Test T	ïmeline	
Please select a project and define the required fields for your test. Start a test session. When you are done, review and upload to Jira/Xray.		
Project*		
CALC - CALC		~
Summary*		
security test		
		-
00:00:00 Set a f	time limit for your test session	
Test type		
Exploratory		~
Charter (test definition)		
To discover problems	with security	
Test execution*		
Ad-hoc test execution		~
Preconditions		
Add precondition		0
Requirements		
Add requirement		0
•	Start session	
🔶 Xray	Elapsed time Remaining tim 00:00:00 00:00:00	10 )

We can then perform exploratory testing and use Xray Exploratory App to assist us during the process. In the end, results can be uploaded to Xray to a newly created Test Execution having the newly created Test along with its result (i.e., the corresponding Test Run).

Please see Xray Exploratory App's documentation for more information on executing exploratory testing sessions and all the available options.