Test Plan

The purpose of a Test Plan is to give you better visibility and management over your Tests.

It provides a table of all the Tests included in the Test Plan and their respective Test Executions.

A Test Plan can be defined as:

- **Static**: by adding Tests explicitly to the Test Plan issue using the Xray issue picker.
- **Dynamic: (Xray Enterprise only)** by defining a saved filter as the source of Tests for the Test Plan. This way, all Tests on the filter will be added automatically into the Test Plan by Xray. For example, you can define a Test Plan with a filter containing the Tests associated with Stories from a Sprint. Your Test Plan will collect all relevant Tests for that Sprint automatically. If a Test Plan is configured with a saved filter, users can't add or remove Tests explicitly from the Test Plan.

Dynamic Test Plan is a Xray Enterprise Feature

Dynamic Test Plans is a feature of **Xray Enterprise**. If you do not have Xray Enterprise installed, the **Dynamic Test Plans are not available** in the Test Plan issue, and it is impossible to configure dynamic test lists. When installing Xray Enterprise for the first time, please make sure to re-enable Xray to load all properties from Xray Enterprise.

If tracking a particular version, the Test Plan will show the latest status for each Test, independent of the number of testing iterations (i.e.,Test Executions) you make with them.

You can group Test Executions and easily give feedback on the current/latest status of the Tests involved in those Test Executions.

From the Test Plan, it's possible to create one or more Test Executions for all or just a subset of the Tests contained within the Test Plan (e.g., only those Tests that are still failing).

You are also able to assign one or more Test Plans to a given release and track progress of those tests within each Test Plan.

The Coverage Analysis can also be done, taking into account just the tests from a given Test Plan and its related Test Executions.

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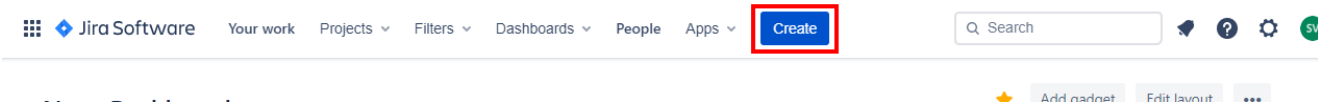
- Xray History
- Configure Test Plan with Saved Filter (Xray Enterprise only)
- How does Xray update dynamic Test Plans based on a Jira saved filter?

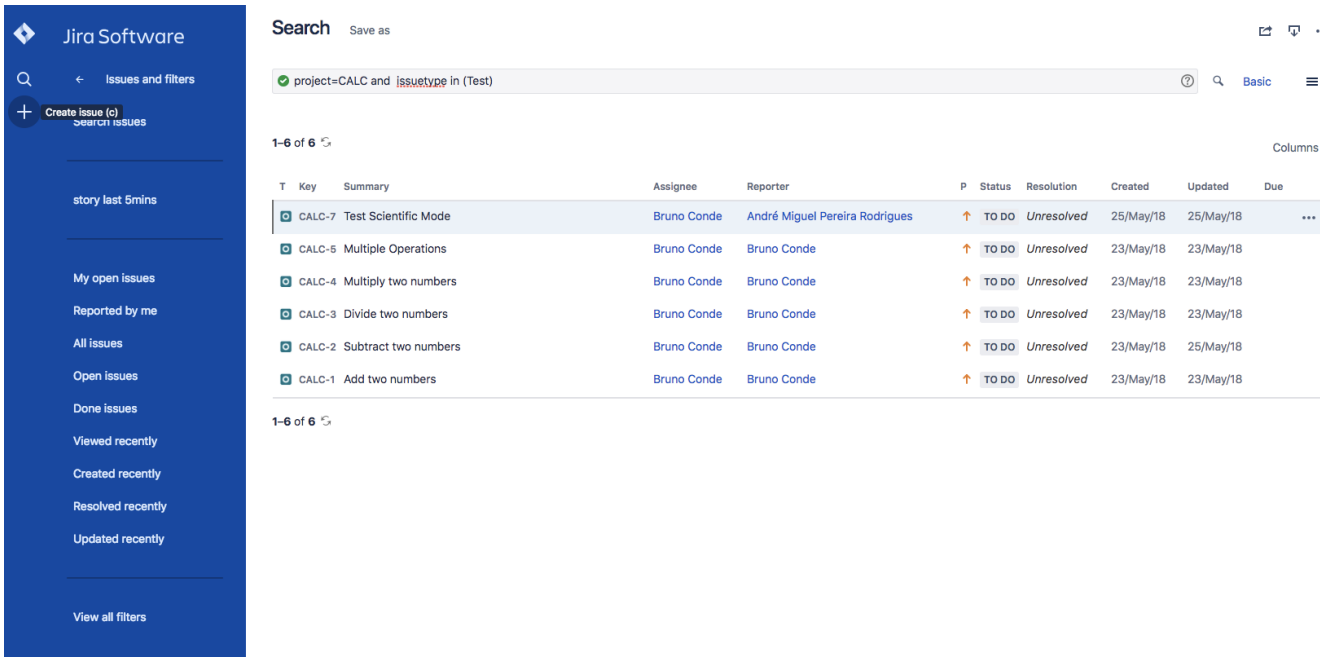
Create Test Plan

To create a new Test Plan Issue,

Step 1: Click the "Create" on the top of the screen to open the **Create Issue** dialog box / page or press the "**C**" key on the keyboard.

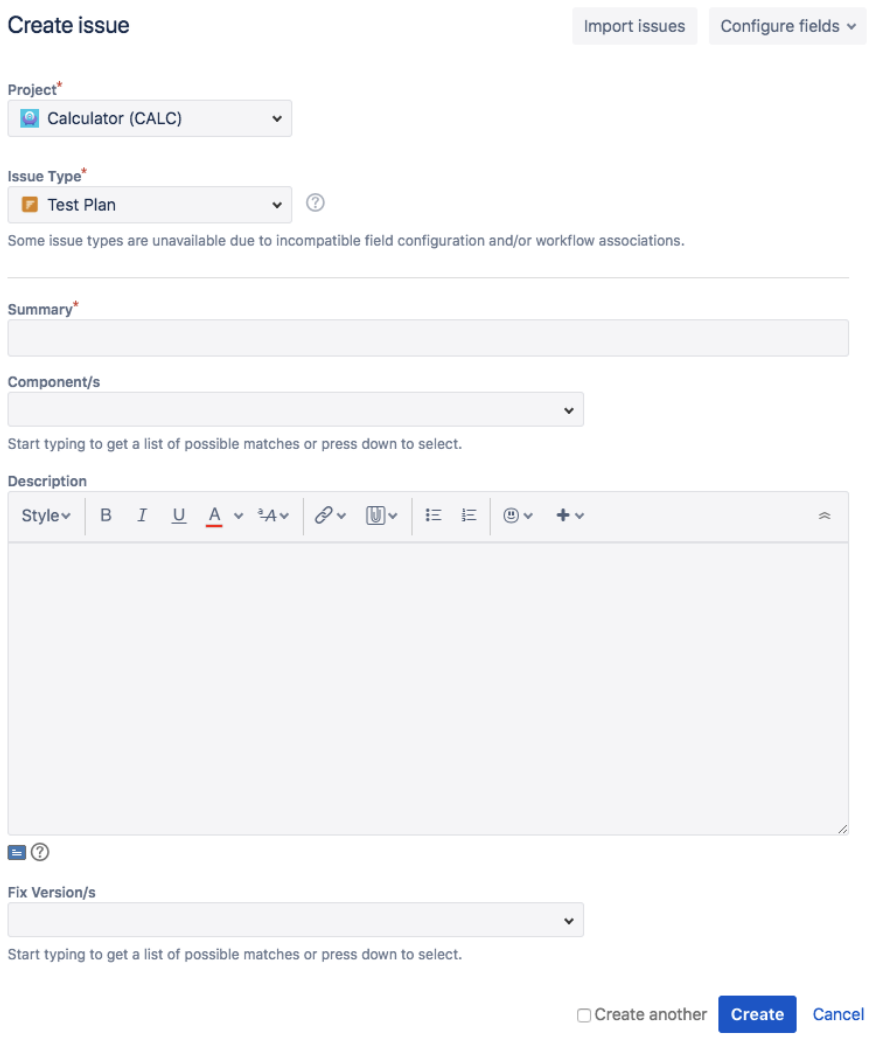


In the old UI, click the "+" on the left:



Step 2: Select the **Project.** On the **Issue Type,** select Test Plan.

Step 3: Type a **Summary** for the test plan and fill out all appropriate fields (mandatory fields are marked with an asterisk). If you're working with versions, then you should also fill out the **Fix Version** to indicate that you're tracking the results of the Tests for that version. This will be used to automatically fill out the Fix Version of the planned Test Executions (i.e., the ones linked to/created from this Test Plan).



Optional: To create a series of similar Test Plans – within the same **Project** – check **Create another** at the bottom of the dialog.

Step 5: When you are satisfied with the content of your Test Plan, click **Create**.

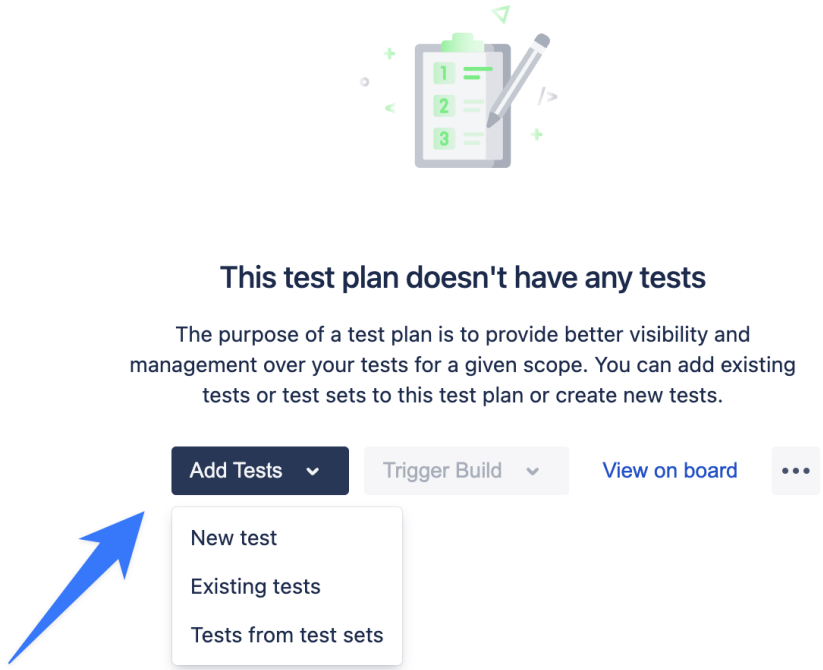
Step 5a: If you checked **Create another**, a new **Create Issue** dialog appears. This issue is automatically pre-populated with your previous Test Plan details, with the **Summary** field blank.

Add Tests to a Test Plan

Aside from adding Tests to the Test Plan using the issue create screen, you can also do it in the Test issue page.

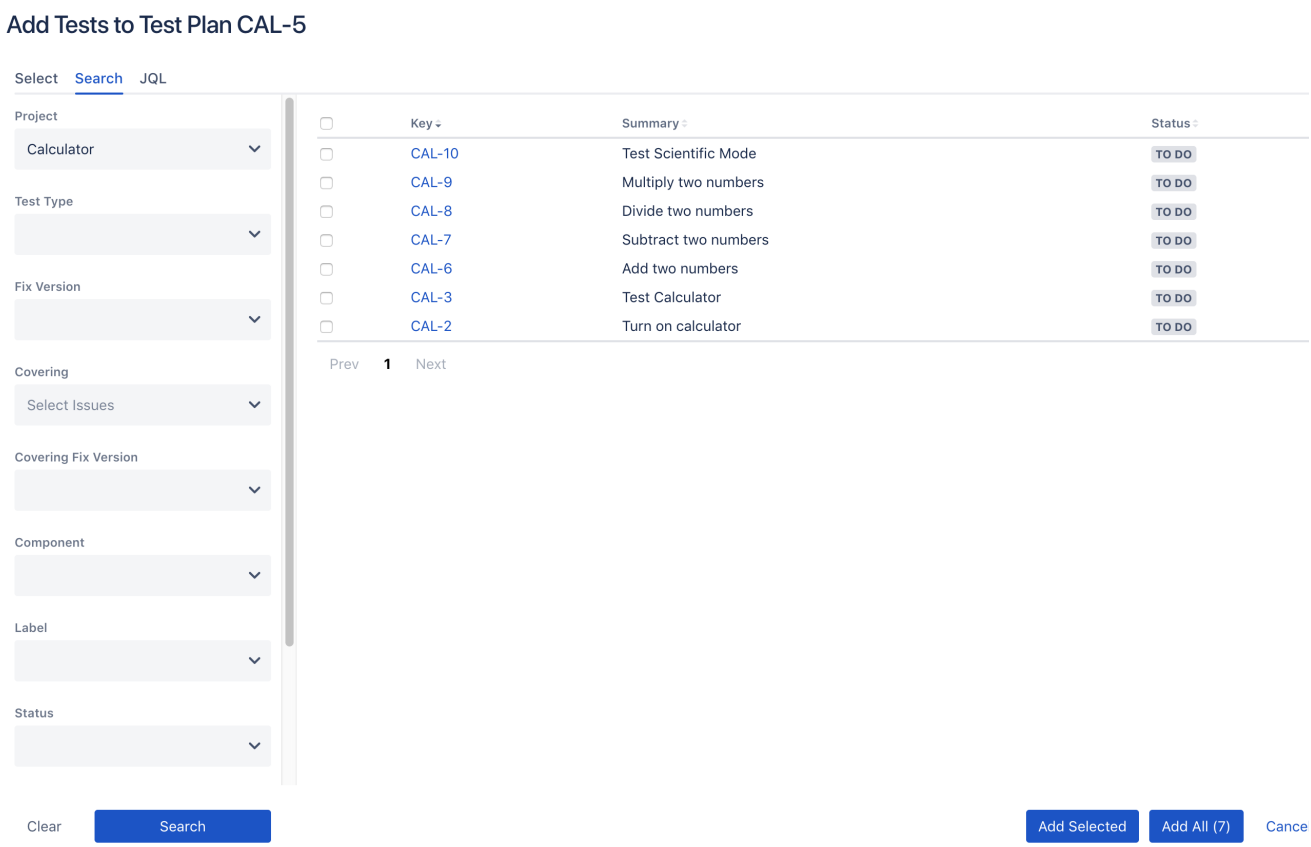
Step 1: Click **Add Tests**.

Step 2: Choose new Test or add existing Tests/Tests from tests sets. Note that if you choose Tests from test sets, you are not actually adding Test Set(s); instead, you are adding the Tests that belong to that Test Set(s).



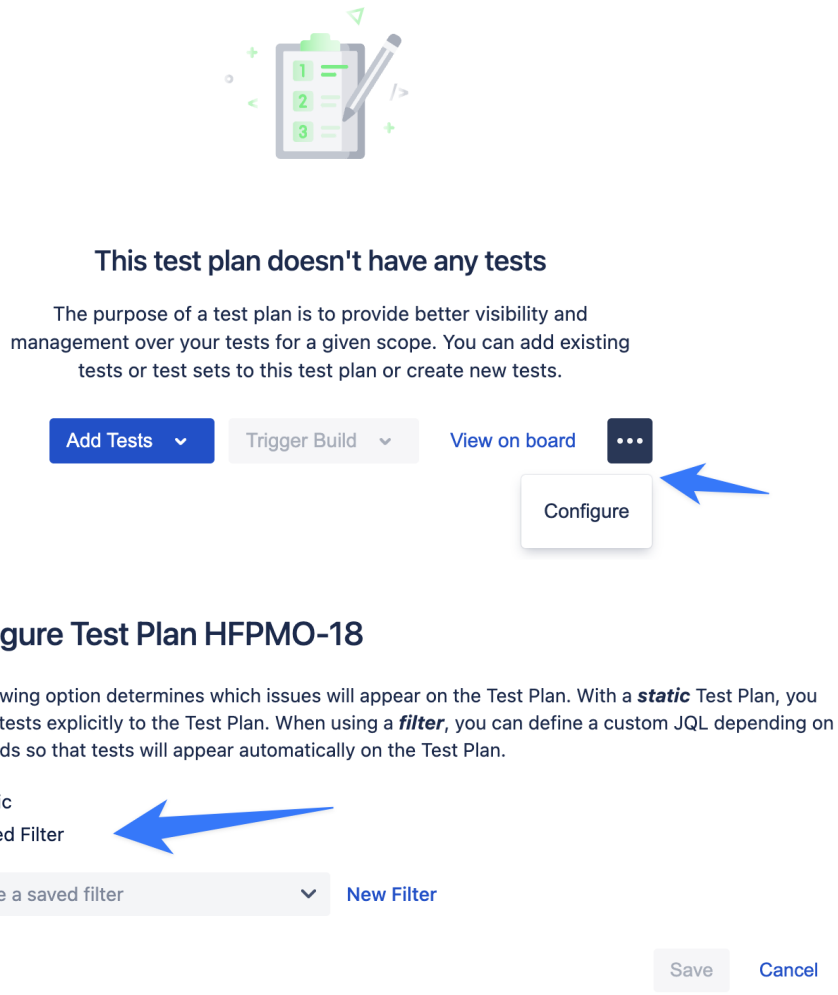
Step 3: Choose the Tests you want, by using the **Select** or **Search** tabs and then selecting some or all of them.

Step 4: Click **Add Selected** or **Add All**.



Step 4a: In this screen, you have the config option under the more action menu (...) where you can configure the Test Plan in two ways:

- For a static Test Plan, you should select the Tests at the **Test associated with a Test Plan.**
- If you have Xray Enterprise, you can select an existing Saved Filter by name on the **Test Plan Tests Filter** and create a Dynamic Test Plan.



How can I create a Saved Filter?

Saved filters are one of the most powerful Jira features that can be used to help you find the information you need, but they also can be used in gadgets, reports, or even subscriptions. As Xray is seamlessly integrated with Jira, you can use this feature to create your Dynamic Test Plans. Learn more about Saved Filters at Jira Documentation.

Reorder Tests

The following procedure details how you can change the order of the Tests, directly in the Test Plan issue screen.

There are two ways of changing the order of Tests within a Test Plan:

Drag-and-Drop

To reorder Tests,

Step 1: Open the Test Plan issue.

Step 2: Hover over the desired Test row (under the **Tests** section on the view page) and the drag handle column.

Step 3: Click the drag handle and move the Test up or down in the current page.

Change Rank Action

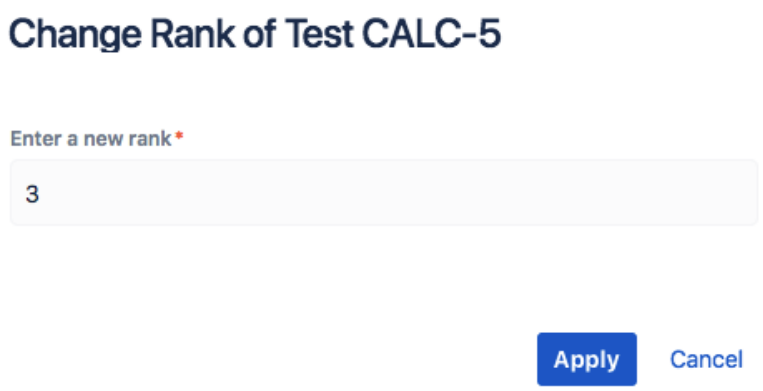
This action allows users to change the Rank of a Test between pages.

To change the rank of a Test,

Step 1: Open the Test Plan issue.

Step 2: Click the **...** on the desired Test Set row and click the **Change Rank** option that appears in the drop down menu. The change rank dialog appears.

Step 3: Enter the desired index number (1-based) and click **OK.**



Associate Test Executions to the Test Plan

Since the table only shows Test Runs for tests that are in the Test Plan and for Test Executions that are associated with the Test Plan, it's necessary to associate Test Executions with the Test Plan.

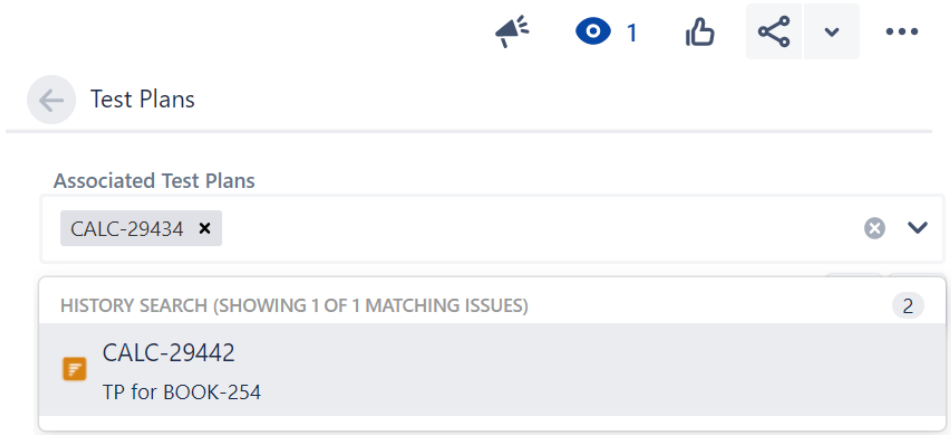
You can also add existing Test Execution issues directly to a Test Plan.

Click **Test Executions** tab

Click **Add Test Executions**

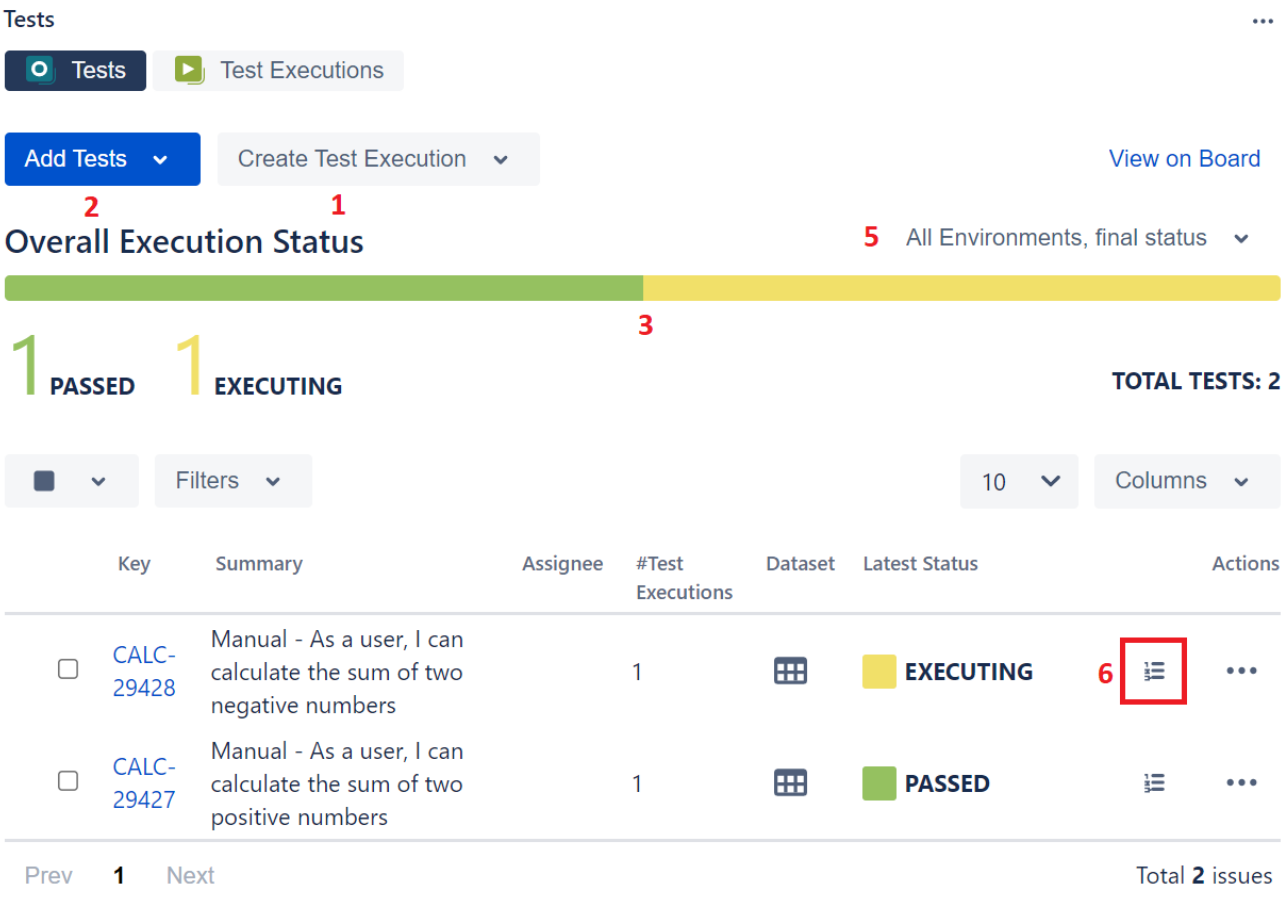
The selected Test Executions will be added, including the Tests associated with those Test Executions.

Test Executions can also be associated with a Test Plan by editing the field **Associated Test Plans** in the Test Plans section in Test Execution issue view page. Note that with this method, only the Test Execution will be associated with the Test Plan; the Tests will not be associated. To inline edit the **Associated Test Plans** field, just hover over the field view area, click it and add or remove the Test Plans you want to associate with the Test Execution.

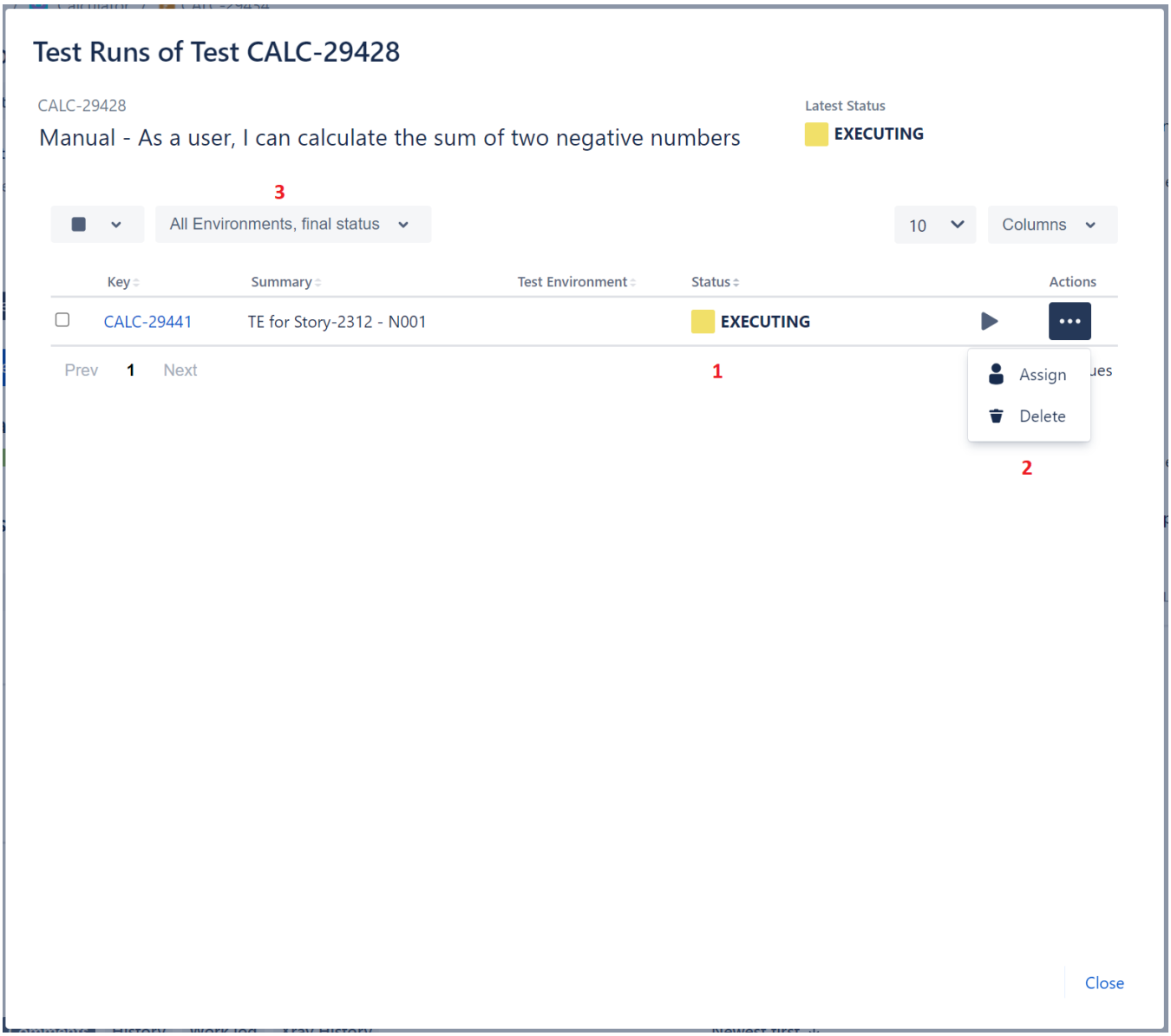


Test Plan table

The Test Plan Tests view section in the issue page provides a table where you can see all the Tests that were added to the Test Plan and their Test Executions (if they are associated to the Test Plan).



1. Create a planned Test Execution (see next Section), so its results will be reflected on the current Test Plan
2. Add Tests and Test Sets
3. Test Plan Progress Bar
4. Table Filters (see Filter Section)
5. Use a Test Environment to calculate the status for test issues for that environment.
6. Opens a dialog with a table that displays information about the Test Runs of a particular Test.



This dialog's table is similar to the Test Run table because it allows for inline execution (1) and for operations like Assign and Delete (2). This table's columns are configurable. Similar to the Tests table in the Test Plans issue view page, it is possible to use a Test Environment to calculate the status for test runs for that environment (3).

Create Test Executions from the Test Plan

There are several ways to create Test Executions directly in the Test Plan issue page.

Create planned Test Execution

The most common and straightforward way to create a Test Execution for all the Tests, or for a subset of those that are currently in some consolidated status, is by using the option available at the top of the Test Plan issue screen.

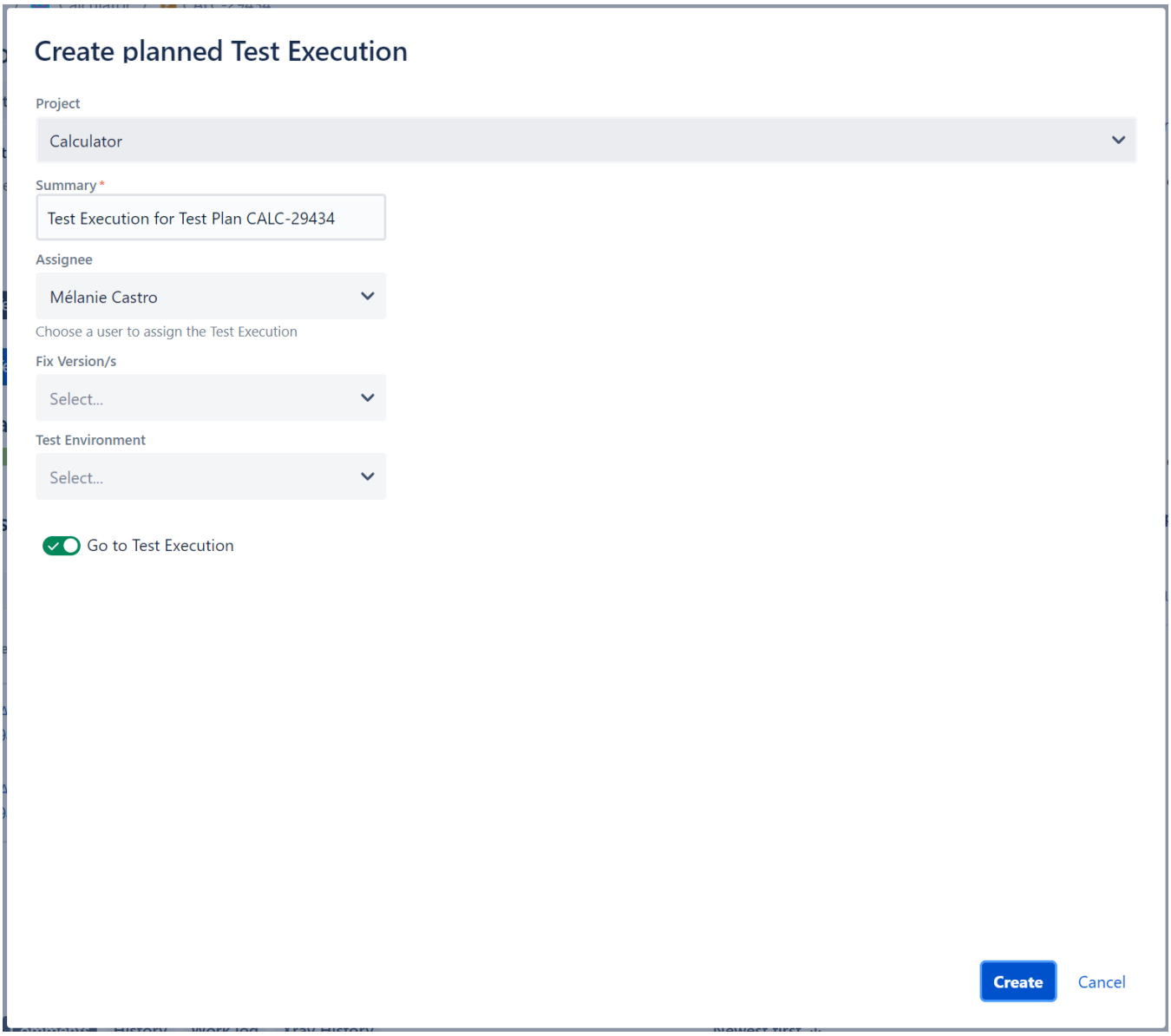
The **Create Test Execution** button will open a dropdown with some options that will allow you to select the Tests that will be part of the Test Execution.

> **Please note**
>
> In order to create a related Test Execution from the Test Plan, you (as a user) must have permission to edit the current Test Plan because the results on the Test Execution will affect the consolidated information shown at the Test Plan. A user will only be able to create Test Executions in certain projects. If the user does not have permission to create Test Executions for a selected project, an error message will be displayed.

All tests...

This option lets you create a Test Execution with all the tests that are associated with the Test Plan.

Note: If the revision field is not configured in the create issue screen of the Test Execution for the selected Project, the field will not appear in the dialog. If there are some mandatory fields, the standard create issue screen will be shown.

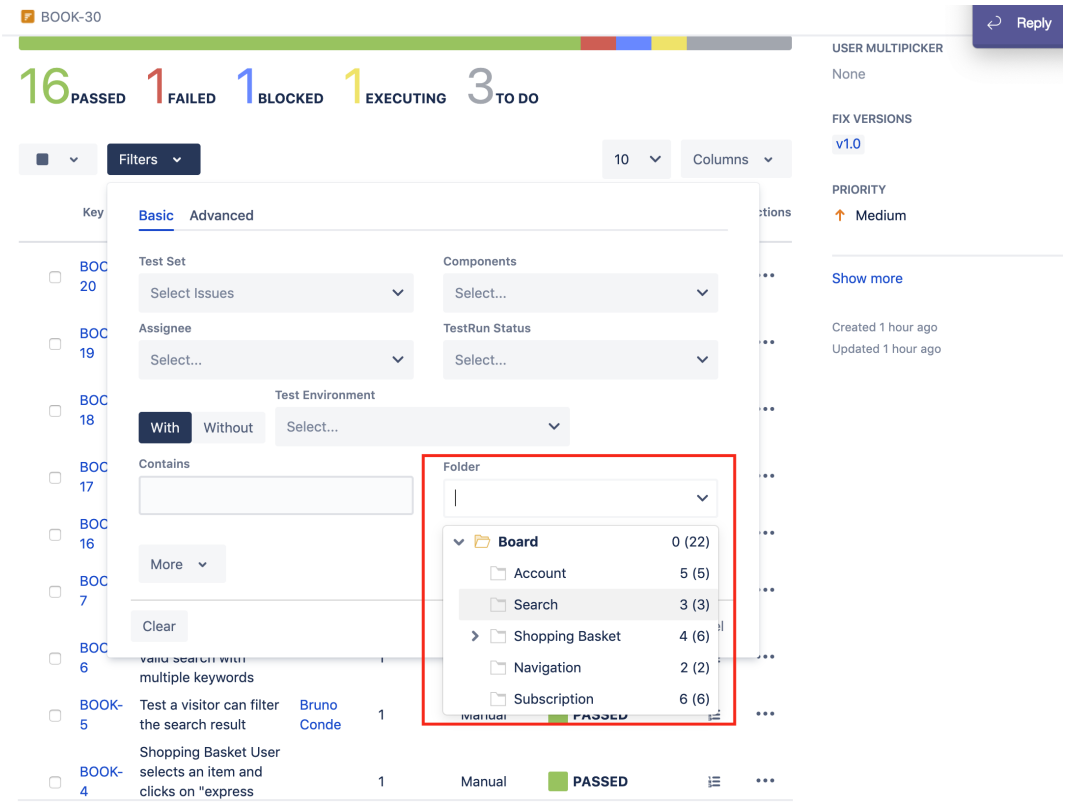


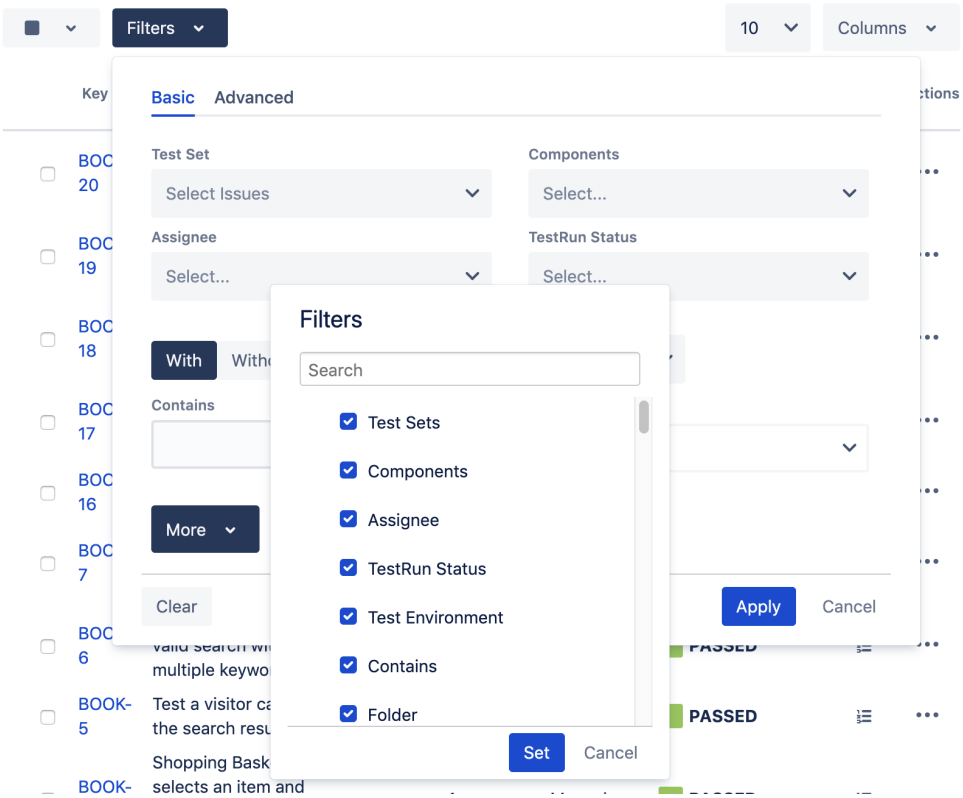
With status...

This option lets you choose the Tests based on their consolidated status. A Test Execution will be created using those Tests.

Filters

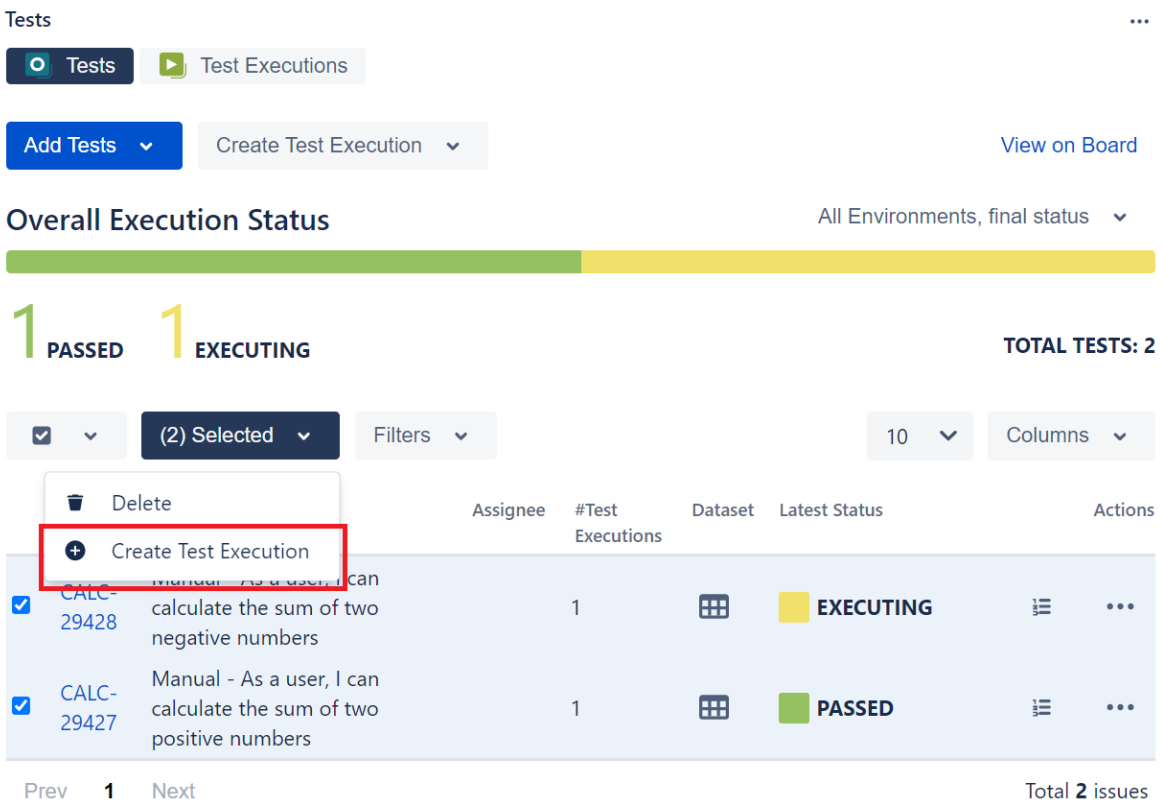
A filter section is present above the Tests table to allow you to filter Tests by Assignee, Status, Test Set, Components, Environment, Board Folder or open text. It is also possible to add other fields to the filter by clicking on the **More** button and selecting the wanted fields.





Bulk action

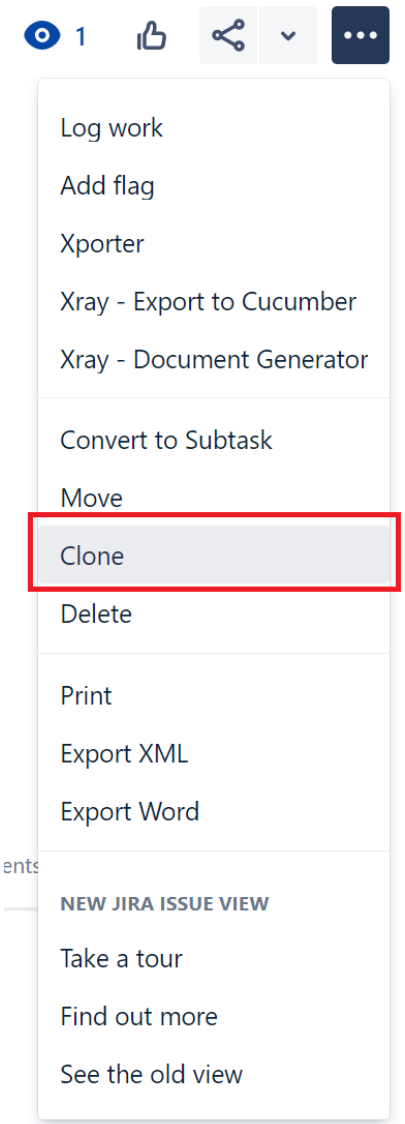
You can select some Tests, using the checkbox next to the Test row, and then schedule a Test Execution for them by clicking **Create Test Execution**.



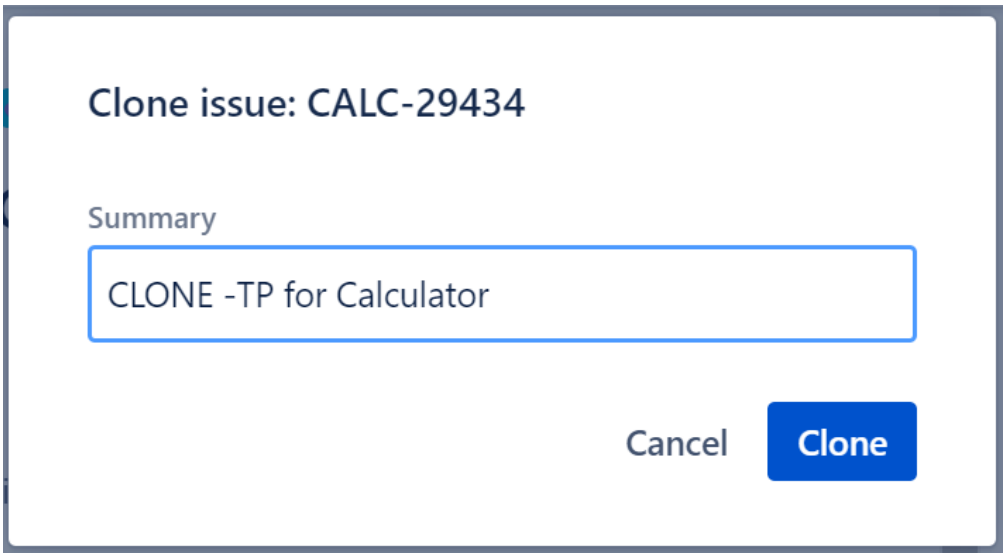
Clone Test Plan

A Test Plan along with its Test issue associations can be cloned.

To clone a Test Plan issue, select the "Clone" action in the issue page:



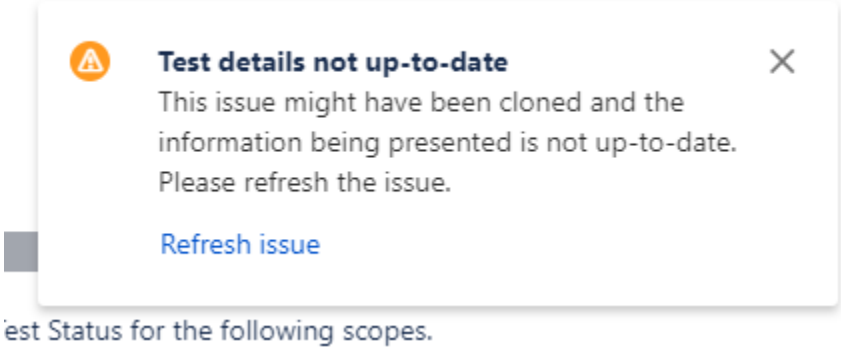
After this, an additional dialog will be shown.



And after the issue is created, its page will be opened.

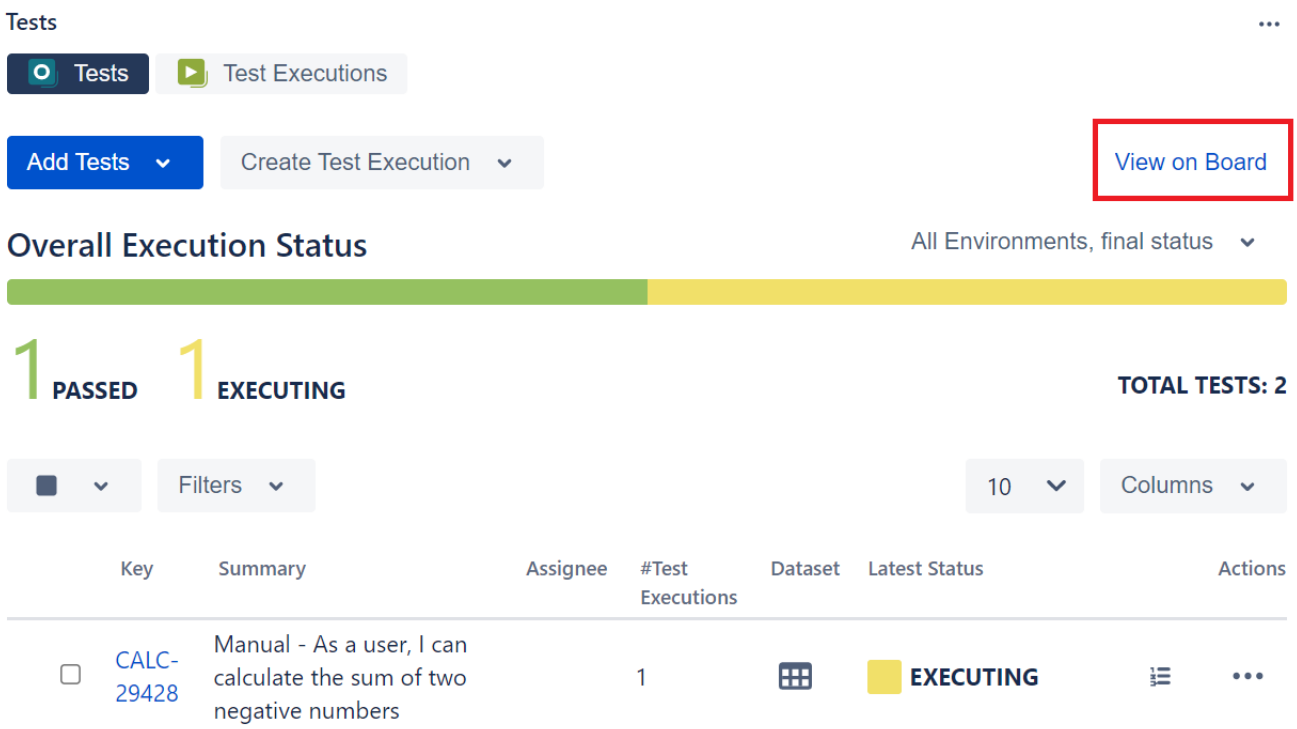
On some occasions the cloned issue page may open before the Xray information is actually cloned and as a result the new Test Plan will appear empty.

When this happens the following information will be shown:



View on Board

The Tests web panel of the Test Plan issue provides a link (View on Board) that allows users to navigate to the corresponding Test Plan board for better test organisation.



Xray History

Any changes made to the Test Plan data are recorded on the Xray History section. These include:

- Linking the Test Plan with other entities (Test and Test Execution)

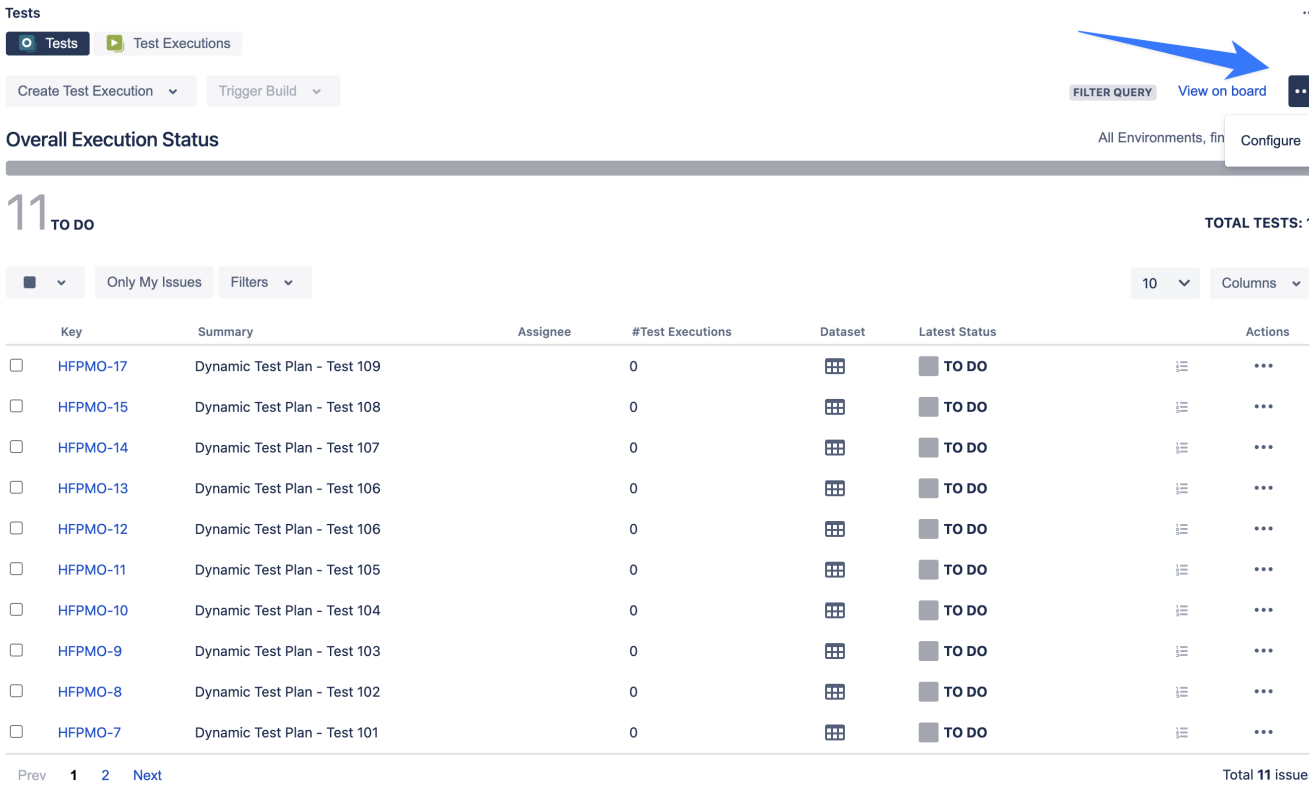
Configure Test Plan with Saved Filter (**Xray Enterprise only**)

Xray Enterprise Feature

Configure Test Plan with a Saved Filter is a feature of **Xray Enterprise**. If you do not have Xray enterprise installed, the C**onfigure Test Plan with a Saved Filter are not available** in the Test Plan and it is not possible to configure dynamic test lists. When installing Xray enterprise for the first time, make sure to re-enable Xray to load all properties from Xray enterprise.

In addition to being able to explicitly add tests to the Test Plan, you can use a filter and you can define a custom JQL depending on your needs so that tests will appear automatically on the Test Plan, as follows.

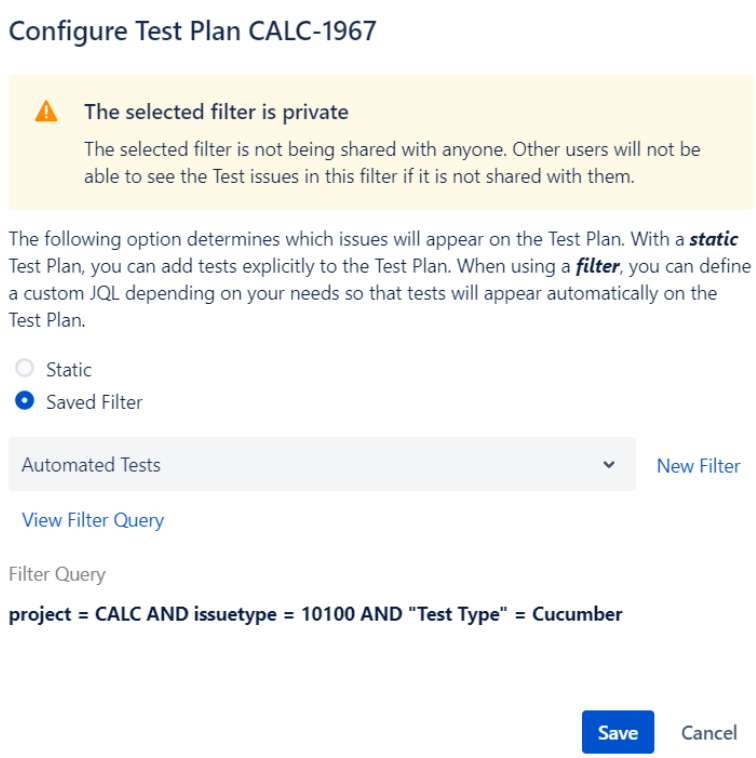
Step 1: Click on "more actions" menu button (...) and then click **Configure**.



Step 2: Click on option **Saved Filter**.

- A link button named "View Filter Query" is provided to navigate to the Saved Filter Jira issue page.

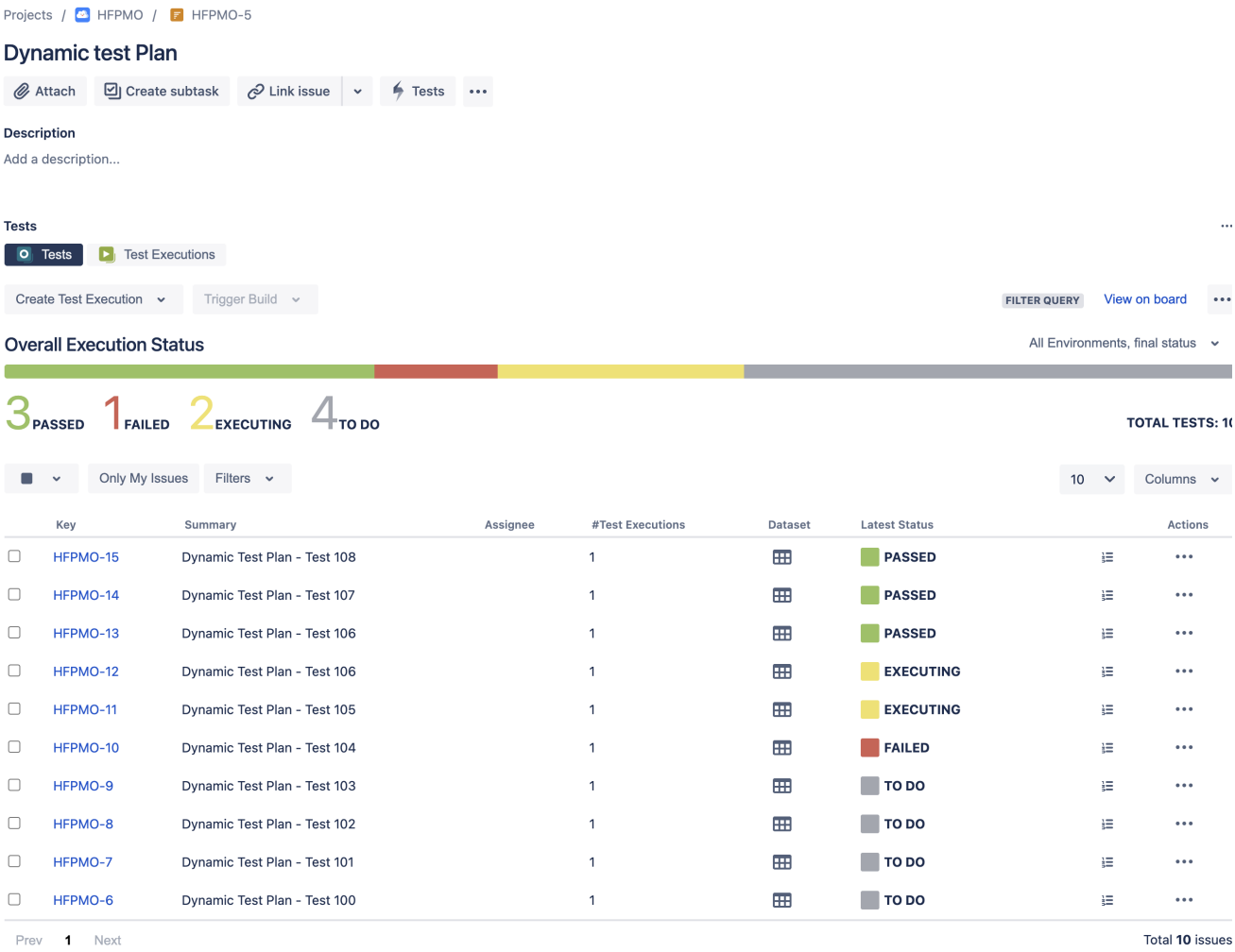
- A link button named "New Filter" is provided next to the Saved Filter select field. This button open the Jira issue search page.



Step 3: Select a query from the select field.

Step 4: Click **Save** button to save the Test Plan configuration.

- Xray update the Tests in the Test Plan automatically and the Tests panel refreshed



How can I create a Saved Filter?

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How does Xray update dynamic Test Plans based on a Jira saved filter?

- Xray will update the Test Plan Tests whenever the user enters the Test Plan issue page.
- Xray will also update the Test Plan immediately whenever the Test Plan is accessed through the REST API.

Using saved filters to create Dynamic Test Plans will avoid users to delete or add Tests from your Test Plan, as well to change the ranking. If you need to make changes at your dynamic test plan list you need to update the filter settings.