Test Plan Board

The **Test Plan Board** is a Test Plan-level test organization feature that allows you to organize Tests in a hierarchical way in folders. Always keep in mind that each Test Plan has an associated (Test Plan) Board and that a Test can only belong to one folder within the Board.

This page will help you understand the Test Plan Board screen and the available operations within it, such as the ability to easily create Test Executions from a given folder or from selected Tests.

> **Learn more**
>
> Please read the Overview of the Test Plan Board for a more detailed explanation of the Test Plan Board, pros and cons, recommendations and additional information.

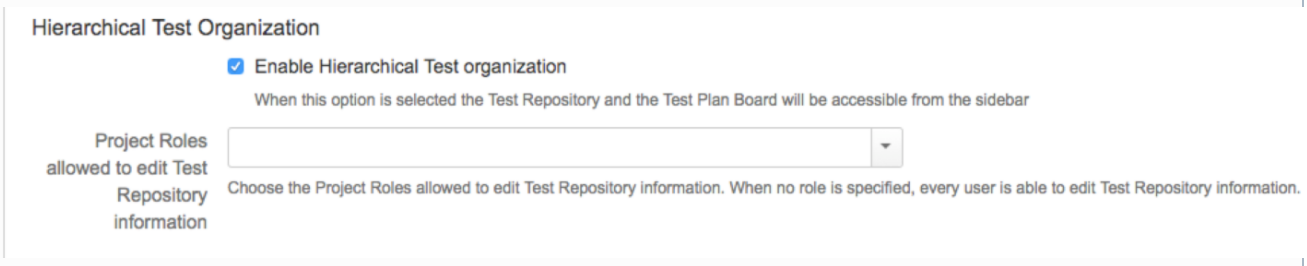
- Settings
- Overview of the Test Plan Board UI
- How to access it
- Switching between Test Plans
- Tracking progress
  - Overall progress
  - Folder progress
  - Analysis by Test Environment
- View Actions
- Folder Actions
  - Create
  - Rename
  - Remove
  - Expand/Collapse
  - Expand/Collapse All
  - View Issues
  - Moving to another folder
  - Ordering / Ranking
  - Create Test here
  - Move into
  - Create Test Set
  - Add to Test Set(s)
  - Create Test Execution
  - Add to Test Execution(s)
- Tests Actions
  - Filtering visible Tests
  - Moving to another folder
  - Ordering / Ranking
  - Create Test Set
  - Add to Test Set(s)
  - Create Test Execution
  - Add to Test Execution(s)
  - Move to Orphans
  - View Issues
- How ranking works when creating, or adding Tests to, Test Sets, Test Executions or Test Plans

Settings

Please note

To edit the Board of a given Test Plan, you must be able to access the project (browse permisison) and have permission to edit the Test Plan issue.

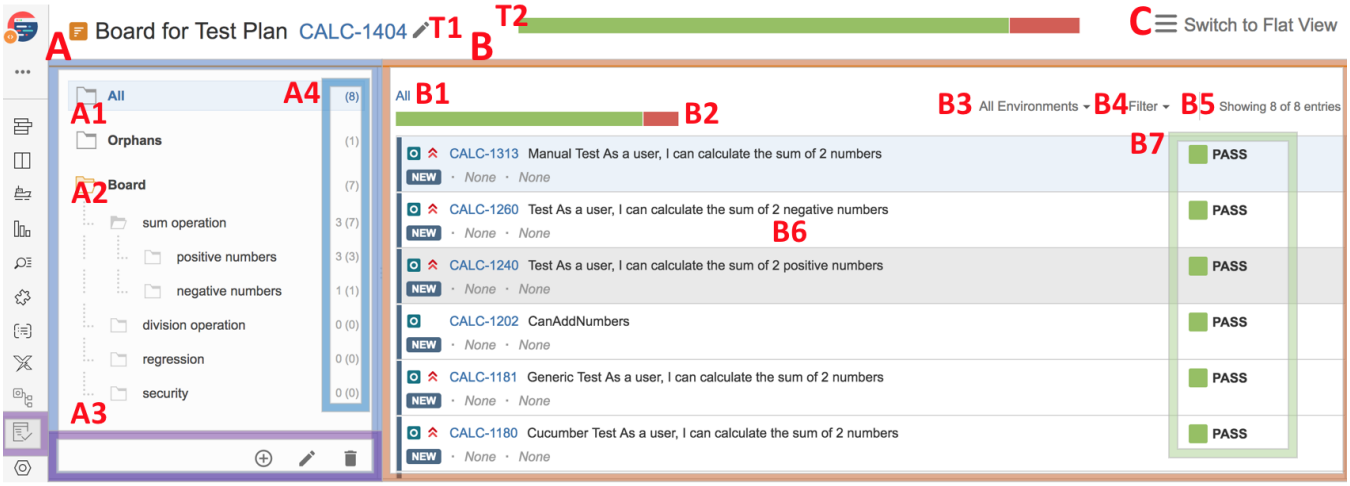
Also, the hierarchical test organization must be enabled in Xray settings.



Overview of the Test Plan Board UI

The Test Plan Board screen can be accessed from the project left sidebar by choosing the Test Plan Board icon.

The following picture depicts the several key areas of the Test Plan Board screen, which includes the Board itself along with other auxiliary folders.



T: Title section

- **T1**: Test Plan's issue key (with the possibility of switching to another issue)
- **T2**: Test Plan's Overall Execution Status

A: Folders section

- **A1**: "All" and "Orphans" meta-folders
- **A2**: the Test Repository itself, composed of folders and sub-folders with Tests organized within them
- **A3**: CRUD actions for the current selected folder (e.g. create, rename, delete)
- **A4**: information about the number of Tests within in the current folder and the total Tests, including sub-folders

B: Tests section

- **B1**: path of the folder
- **B2**: overall execution status for this folder (takes into account the Test Environment selected)
- **B3**: Test Environment to consider for the computation of the overall execution status
- **B4**: Test filters
- **B5**: displayed Tests vs the actual total number of Tests within the current folder
- **B6**: ranked list of Tests within the current folder (only direct children)
- **B7**: calculated status for each Test, based on runs from related Test Executions in the selected Test Environment

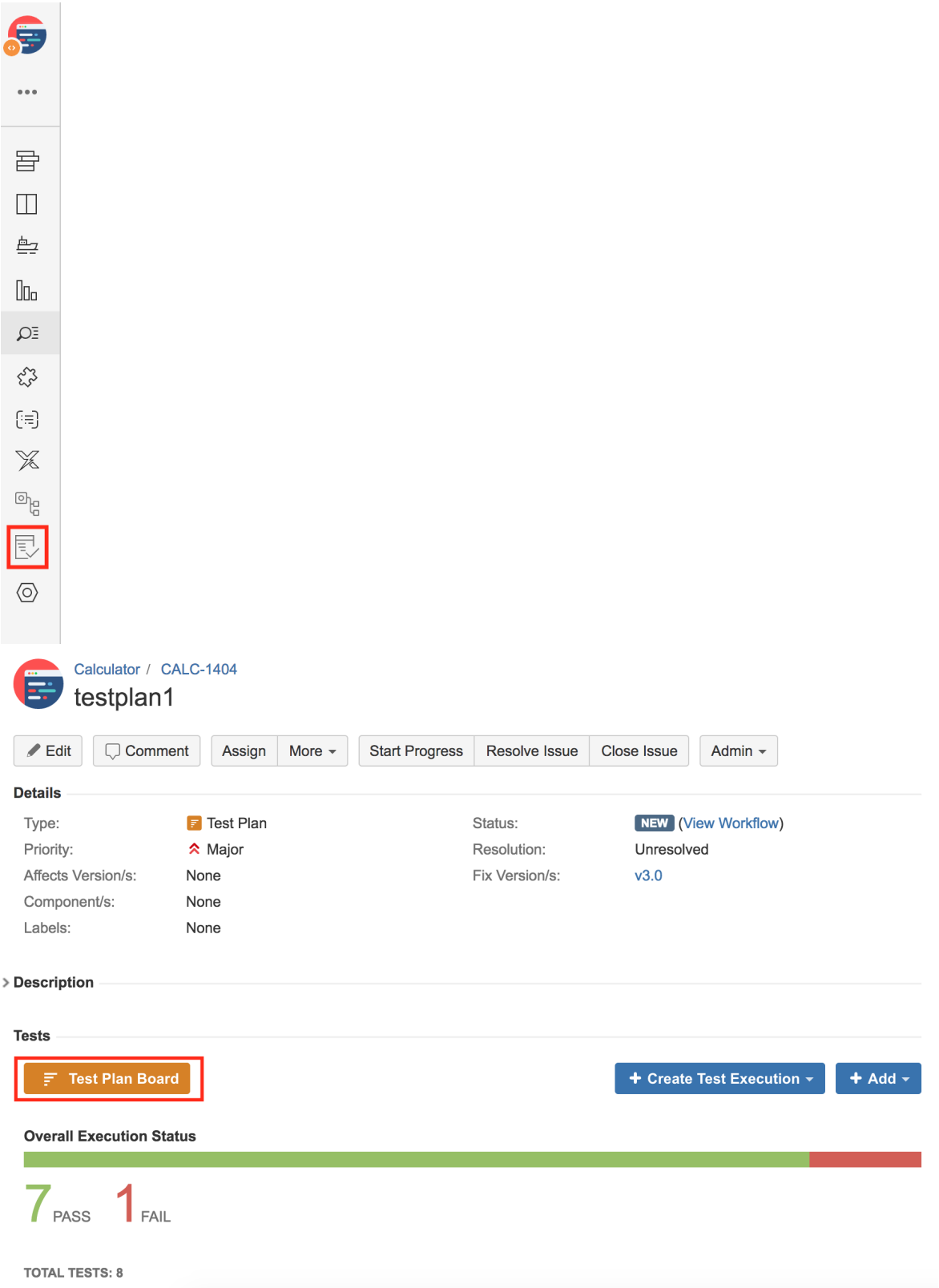
C: Switch between "flat view" and "folders view"

Clicking on T1 will redirect you to the standard Test Plan issue screen.

How to access it

To reach the Test Plan Board UI, you can simply use the proper project icon at the top "Tests" menu.

It is also accessible right from the Test Plan issue screen.

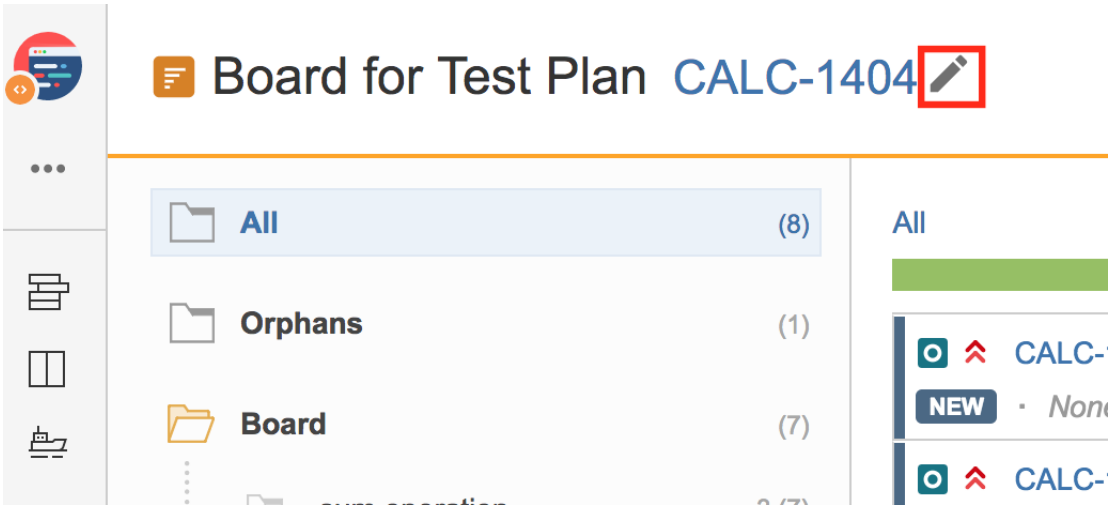


Switching between Test Plans

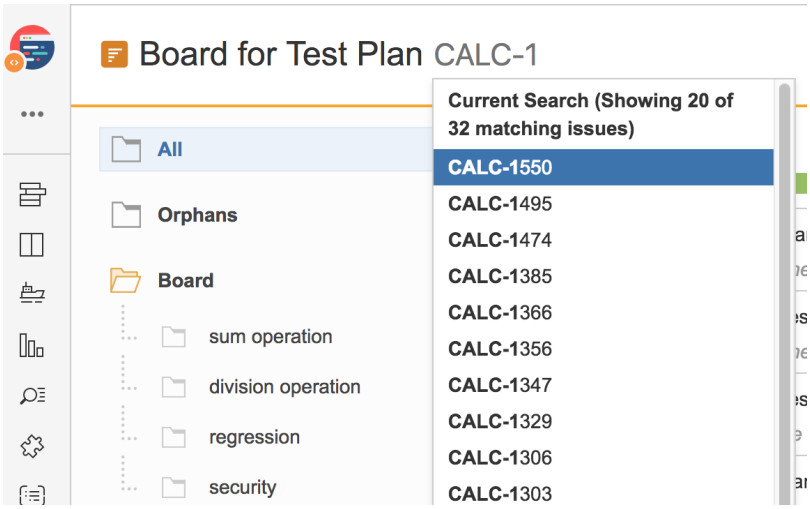
After entering the Test Plan Board UI, you can switch between different Test Plans to manage their respective Boards.

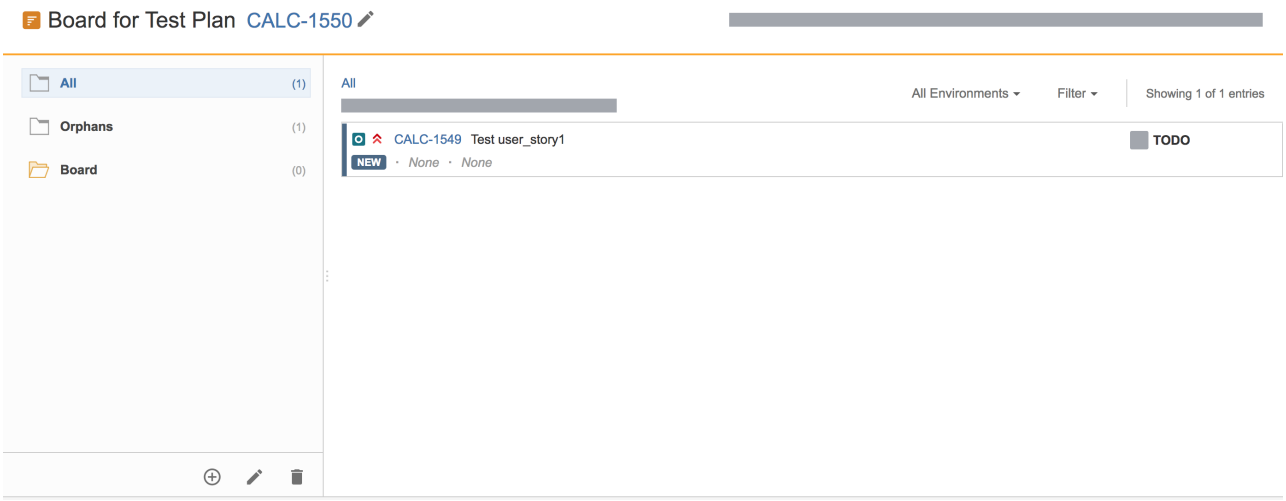
In order to switch between Test Plans:

Step 1: Click on the icon near the Test Plan issue key.



Step 2: Search/select the issue key of the desired Test Plan.





Tracking progress

The Board presents the consolidated results for the Tests that are part of the Test Plan; in other words, you're able to see the latest status for each Test that is being tracked on the Test Plan, regardless of the number of runs you make for it. If you schedule and run multiple test cycles (i.e., Test Executions), the Board will group the results from those executions and will show you the calculated status for each Test.

You can then see the overall execution status of the Test Plan, globally taking into account all the planned Test Executions you create in the different environments.

If you need to drill-down and see the current status for subset of Tests, you can do it at the folder level.

Overall progress

In order to track the overall progress of the Test Plan, use the top progress bar (T2).

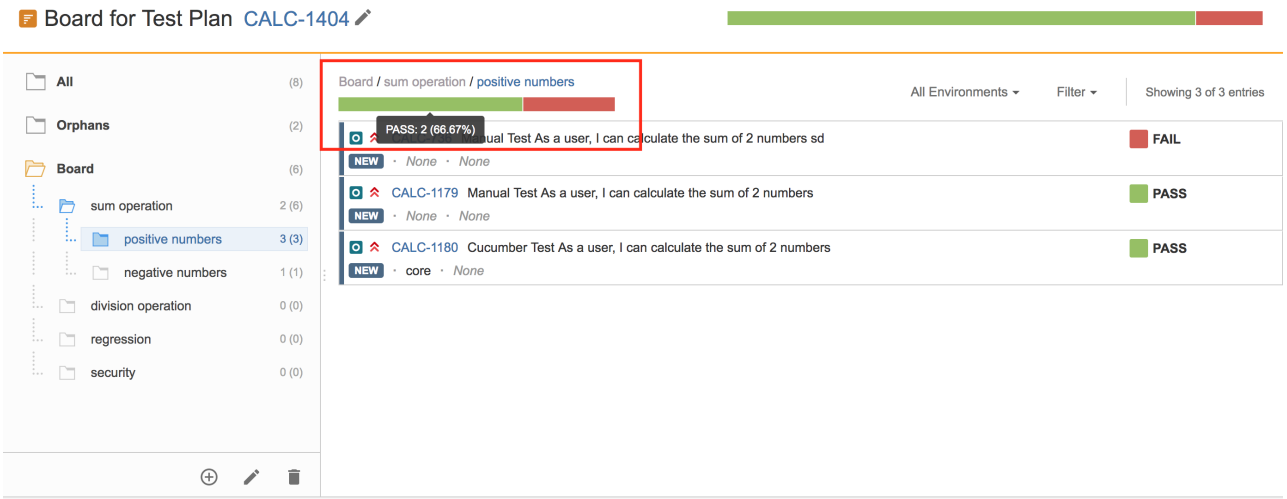
Moving the cursor over the bar elements will give information on the number of Tests (absolute and percentage) that are currently in that status.

The overall execution status takes into account the joint results for all the Test Environments in which you have run your Tests (i.e., a Test will appear as PASS only if it passed in all the Test Environments for which you scheduled Test Executions).

Folder progress

By allowing you to see the progress per folder (B2), you're able to analyze the status of a subset of Tests that are part of the Test Plan.

The analysis per folder takes into account the selected Test Environment; by default, it shows the calculated status for "All Environments".



The values shown for each folder only take into account the immediate child Tests (i.e., the Tests that are within that folder). Thus, this bar shows the totals for the Tests that are seen "underneath" it.

On the right side of each Test (B7), you will be able to see the current calculated status for that Test, in the context of the Test Plan and the selected Test Environment. The status that is shown corresponds to the last run made for that Test in the scope of the related Test Executions, taking into account the selected Test Environment.

Analysis by Test Environment

Tests can be analyzed by Test Environment (i.e., taking into account the results for some given Test Environment) using the proper action (B3), so you can see the current testing status for that environment.

Thus, you're able to analyze on a per Test Environment basis or see the overall status, if you choose "All Environments". For more information on using Test Environments and the calculation of the status for a given environment, please see Working with Test Environments.

The analysis by Test Environment is only applicable to the folder progress bar (B2) and the individual test statuses (B7).

> **Please note**
>
> If you want to evaluate the overall status of your Test Plan for some Test Environment, you can do it in the "All" meta-folder.

View Actions

You can choose between the traditional, hierarchical/folders view or a flattened view.

If you choose "Folders View" then in the Tests section (B) you will see just the Tests that are direct childs of the folder selected in the left side, within the Folders section (A). In this case you can only select Tests directly within the current selected folder.

On the other hand, if you prefer you can switch to a "Flat View"; if so, you'll see on the right side (Tests section) all the Tests that belong to that folder and related sub-folders, grouped by folder. Then you can apply a filter, if you want, select some of the Tests (no matter in which sub-folder they're in) and do an operation for them.

Folder Actions

A folder can be selected by clicking on it.

Once selected, you can do some context actions or use the icons available at the bottom of the folders section.

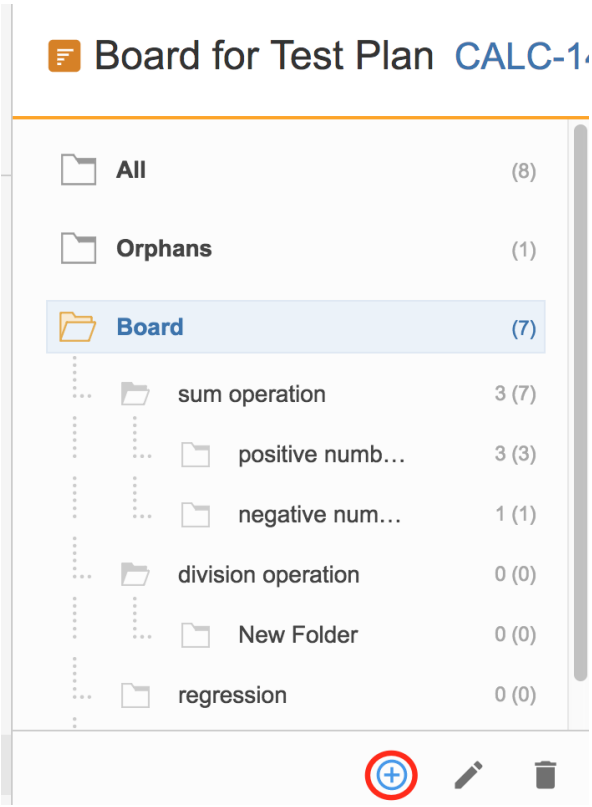
Note: Currently, it is not possible to select multiple folders.

Create

To create a new folder:

Step 1: Click on the parent folder.

Step 2: Click on the proper add icon at the bottom of folders section.



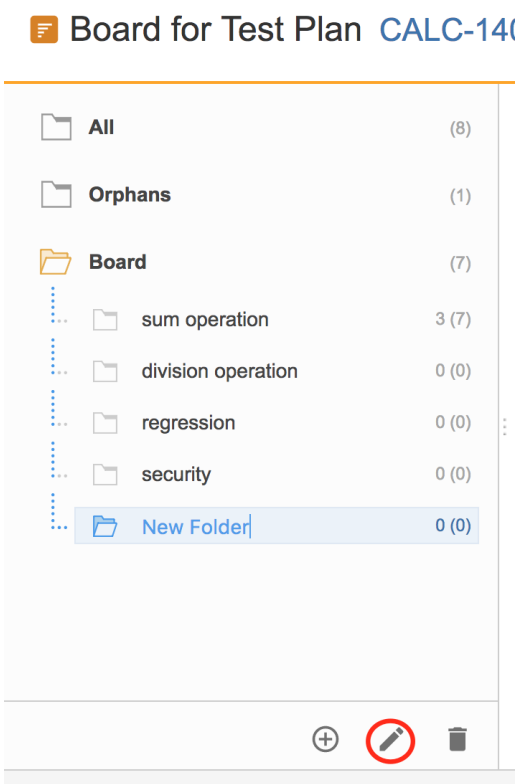
Step 3: Type the name for the folder.

Step 4: Press Enter or click outside of the selected folder.

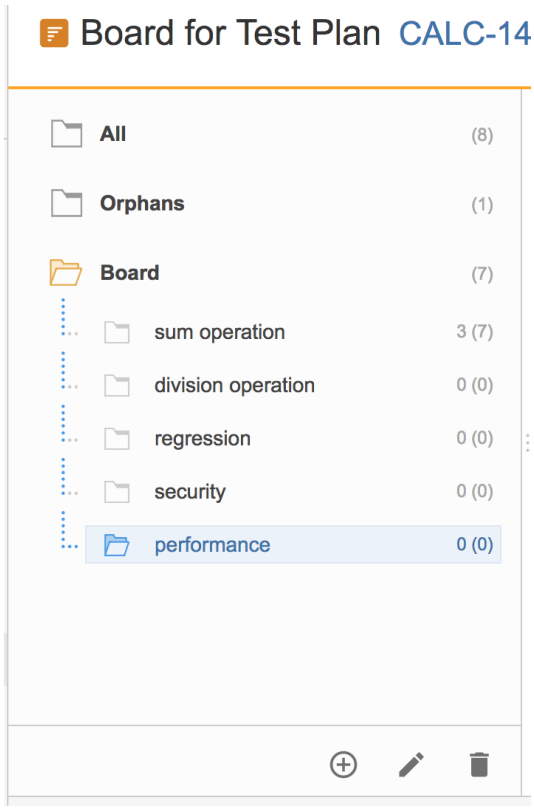
Rename

To rename an existing folder:

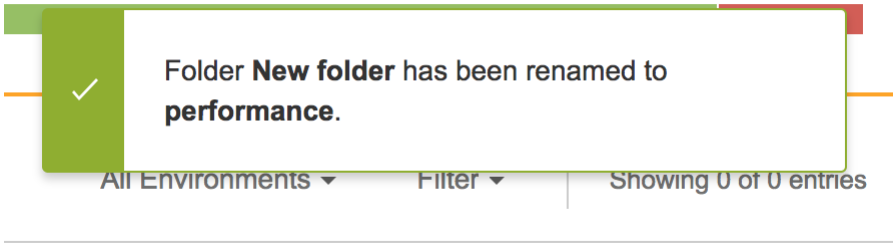
Step 1: Either double-click on the folder or select the folder and then click the proper edit icon at the bottom of the folders section.



Step 2: Type the new name for the folder.



Step 3: Press Enter or click outside of the selected folder



Remove

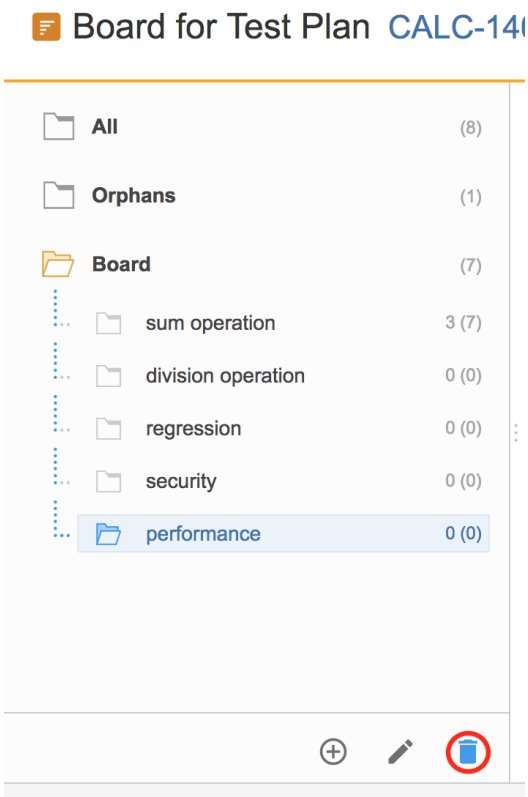
You can easily remove an existing folder, and its descendant folders.

Tests that were in one of the removed folders will not be erased; Tests will be removed from the Test Repository to the Orphans meta-folder, so they can be organized in the Test Repository again, if needed.

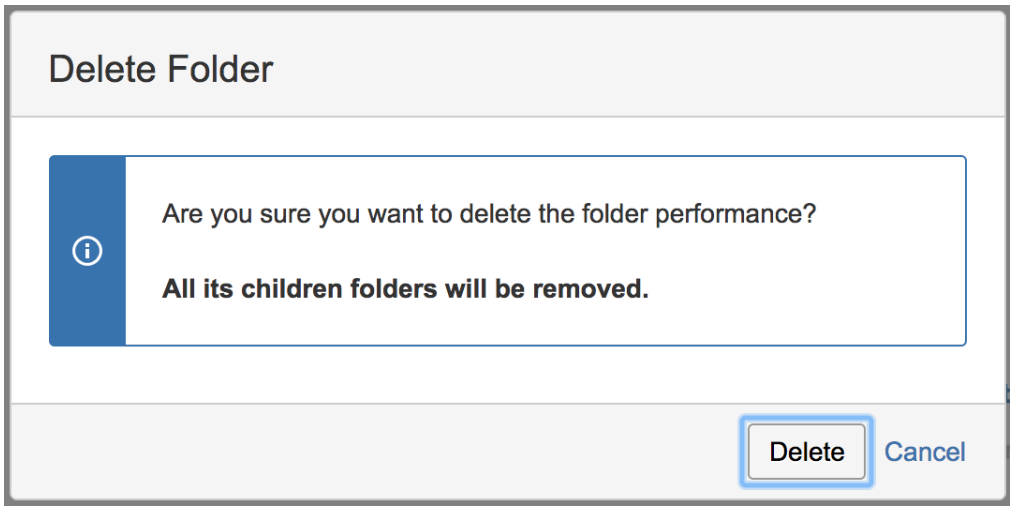
In order to remove a folder:

Step 1: Click on the parent folder.

Step 2: Click on the proper remove icon at the bottom of folders section.

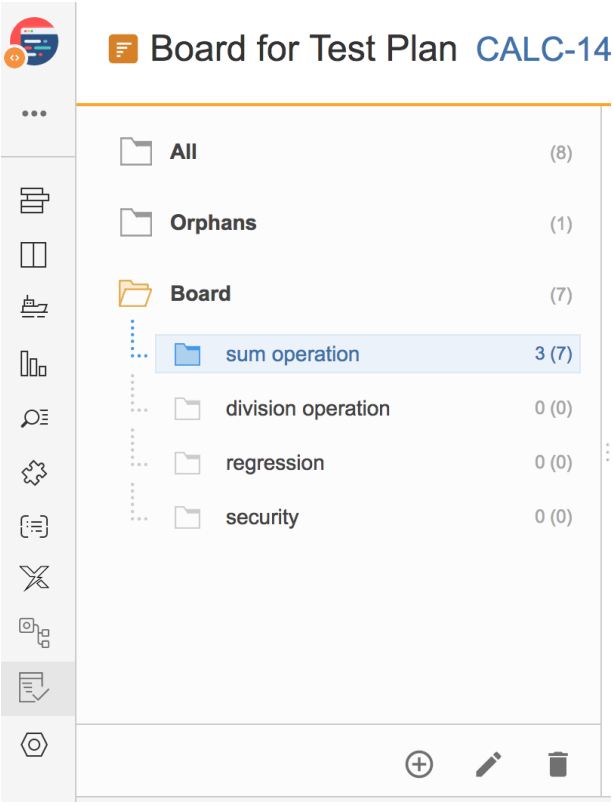


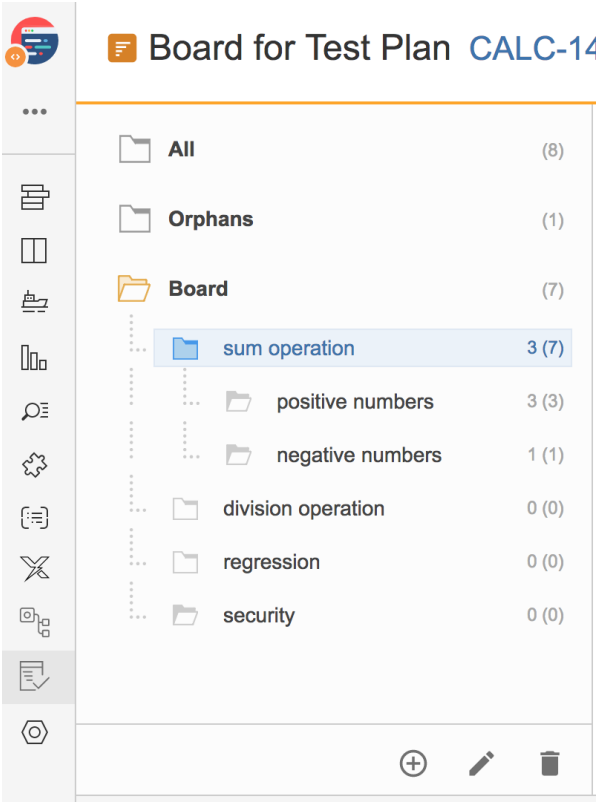
Step 3: Confirm removal of folder.



Expand/Collapse

Folders can be expanded or collapsed easily by clicking the folder.





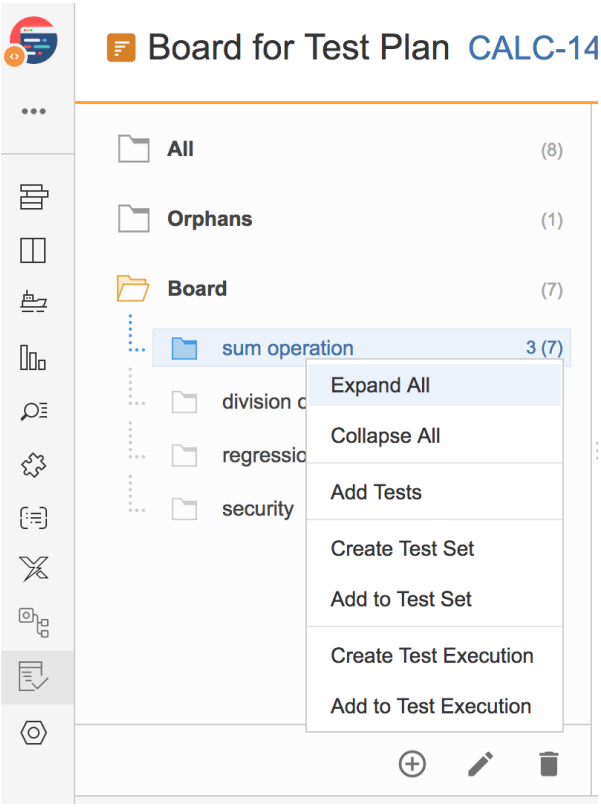
Expand/Collapse All

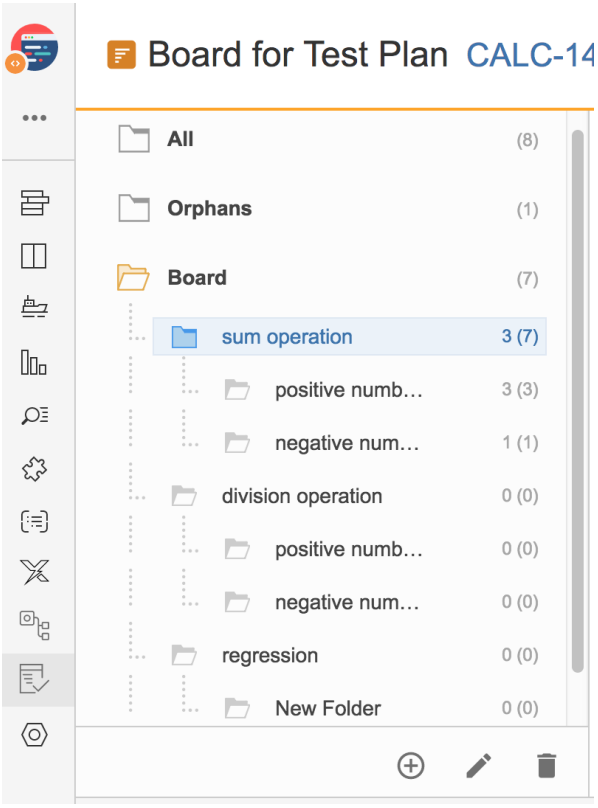
Expand all and collapse all actions are available as contextual actions. These actions alow

In order to expand all or collapse all the subfolders of a folder:

Step 1: Click on the parent folder.

Step 2: Use the context action **Expand All** or **Collapse All**.





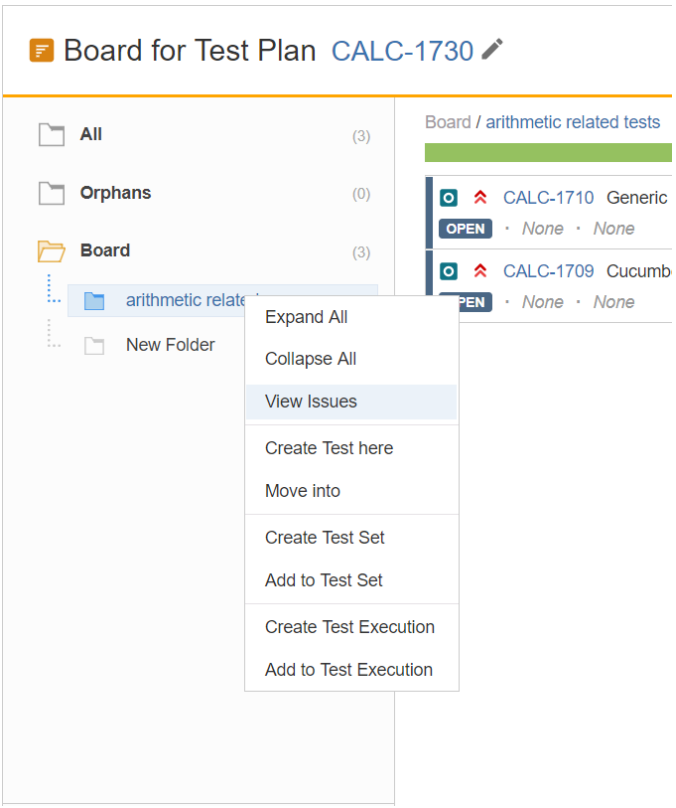
View Issues

You can view the Test issues, from the selected folder and from its subfolders, in the issue search screen.

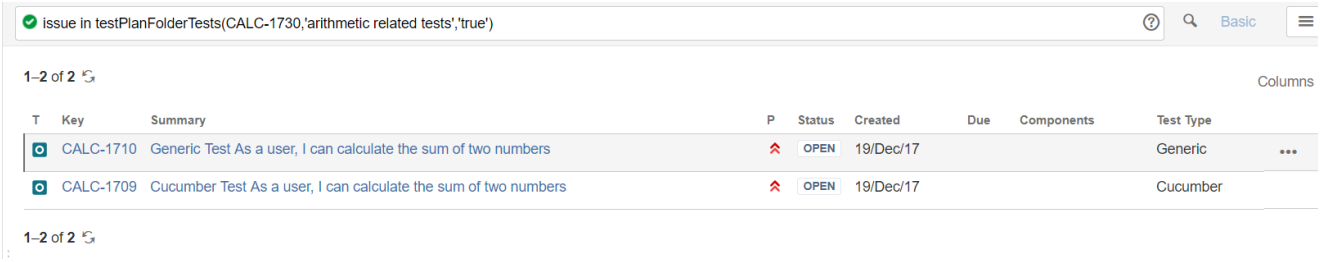
In order to view the Test issues:

Step 1: Click on the folder.

Step 2: Use the context action **View Issues**.

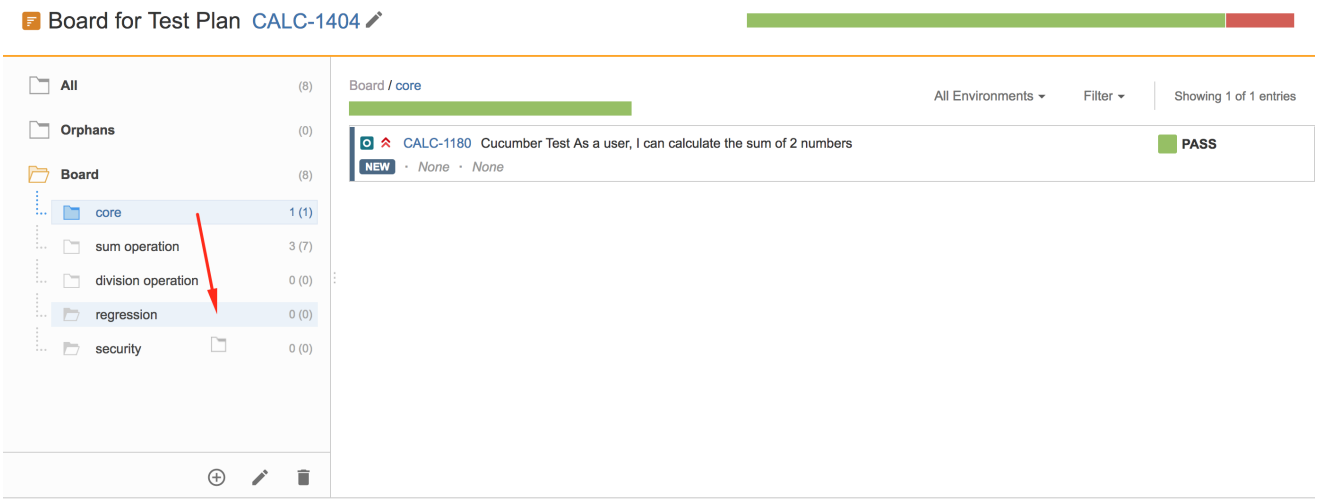


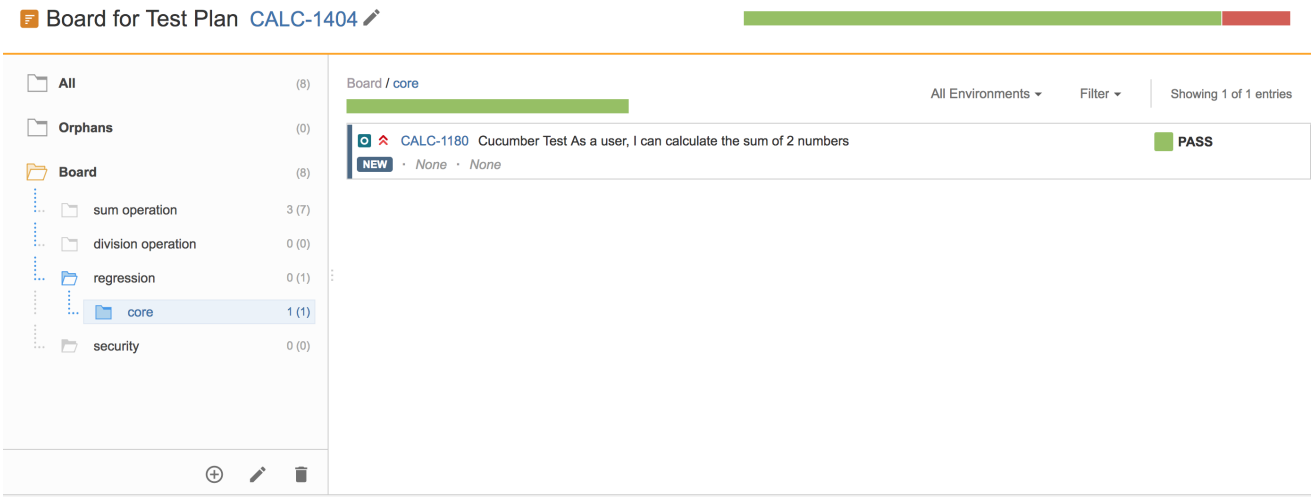
You will be redirected to the search issues page



Moving to another folder

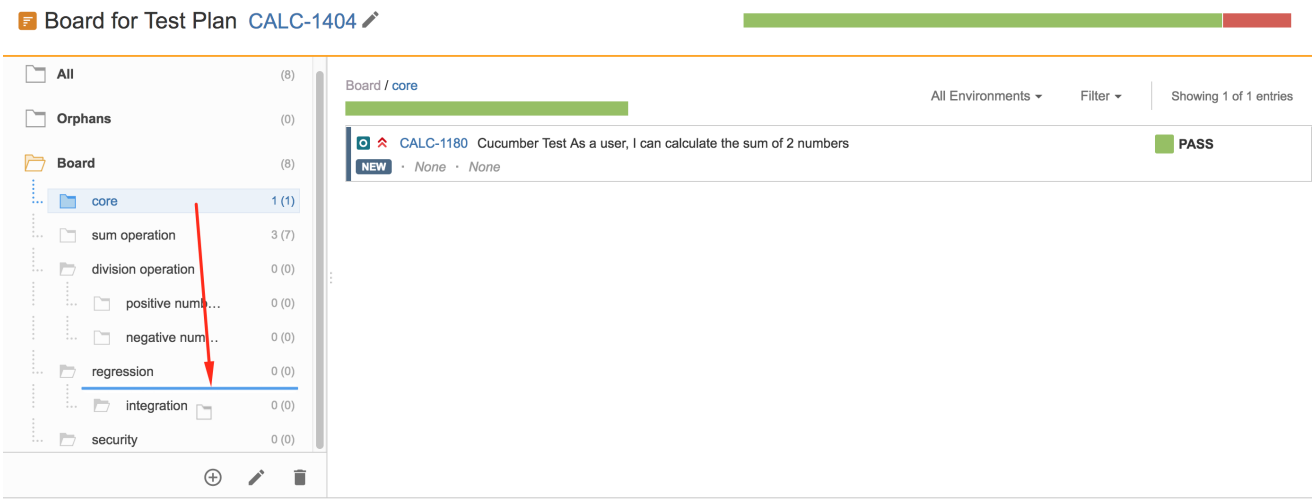
A folder, including its descendants, can be moved to another folder just by dragging-and-dropping to the destination folder.

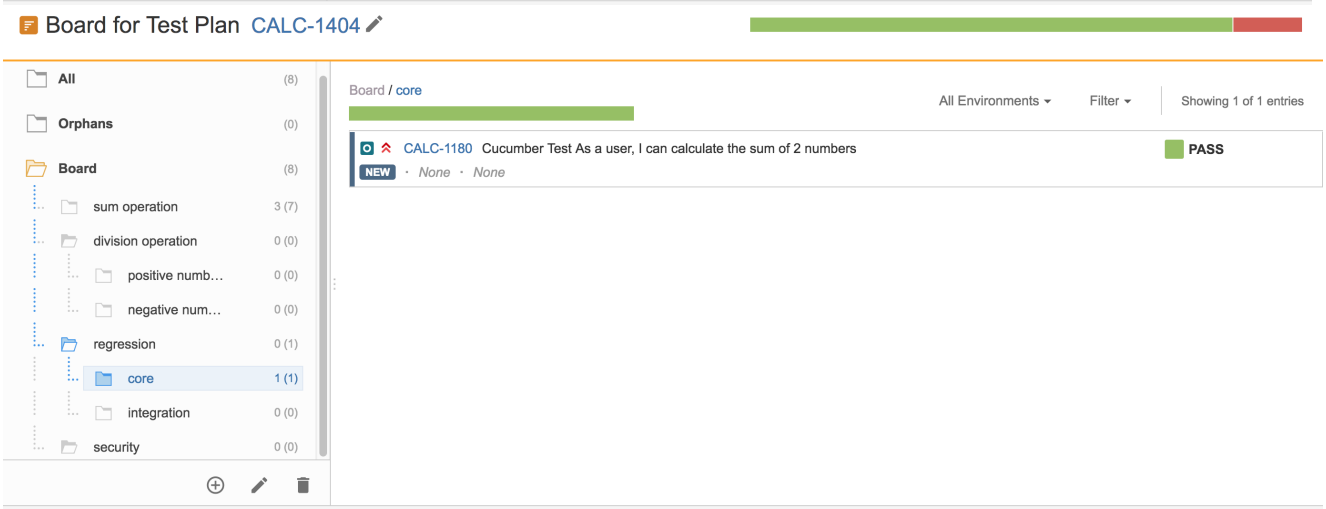




Dragging the folder directly on top of an existing folder will append it to the list of current child folders.

You can also move directly to a given position/rank by choosing the interim space between the existent folders.

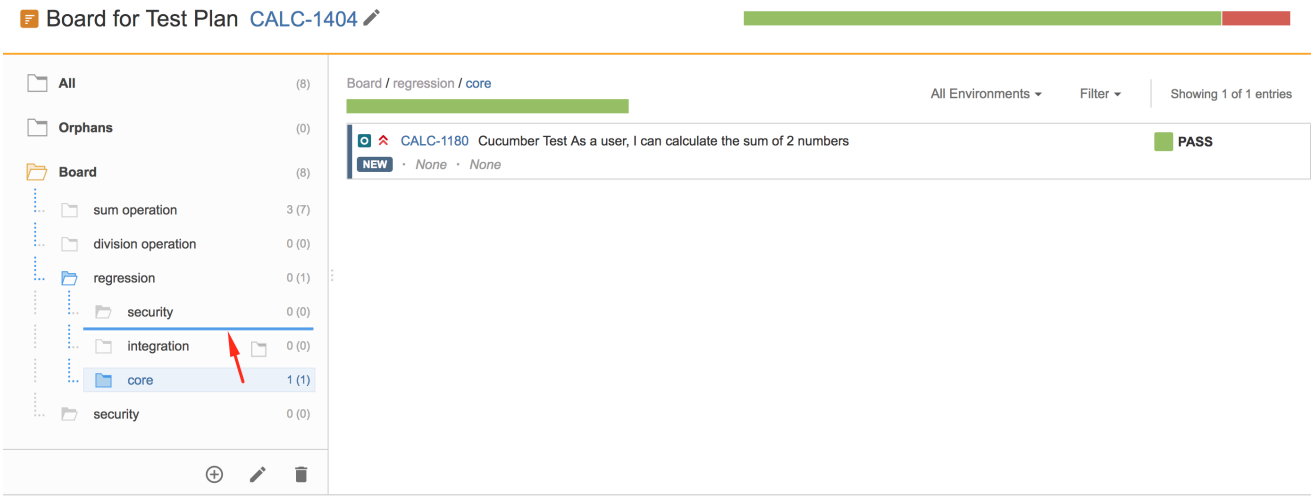




Ordering / Ranking

A folder can be ranked within its parent folder by using drag-and-drop.

Note: If you wish to rank it as the last one (i.e., move it to the last position) within a parent folder, you just need to drag it to the parent folder.



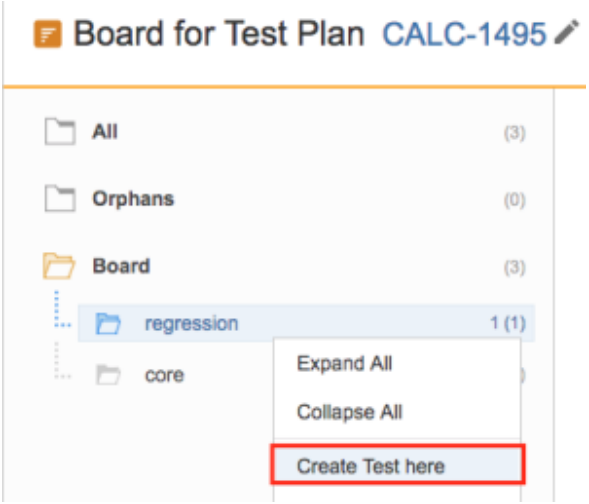
Create Test here

You can create a Test and associate it automatically with the selected Test Plan Board folder.

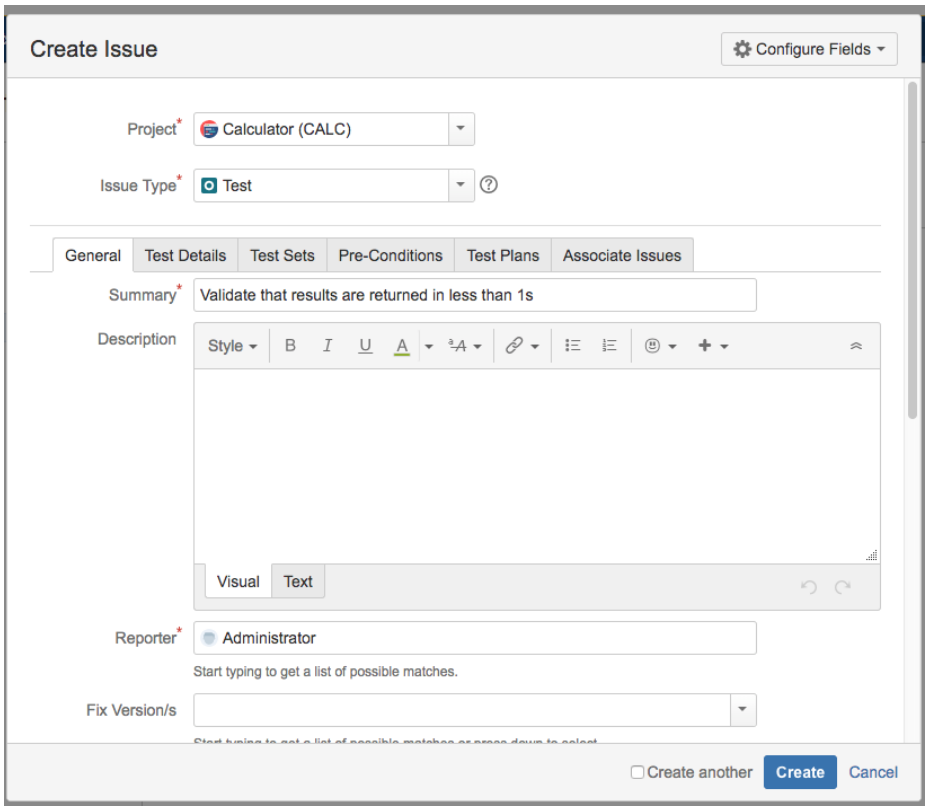
In order to create a Test in a folder,

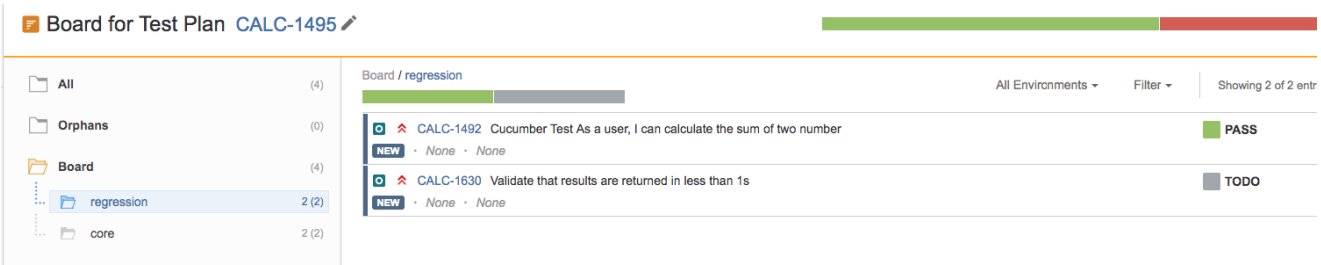
Step 1: Click on the folder.

Step 2: Use the context action **Create Test here**.



Step 3: Fill out the Test fields and click **Create**. You have created a brand-new Test and associated it with the selected folder.





Move into

Users can "add" Tests, that are already part of the Test Plan, to an existing folder based on some filters or JQL.

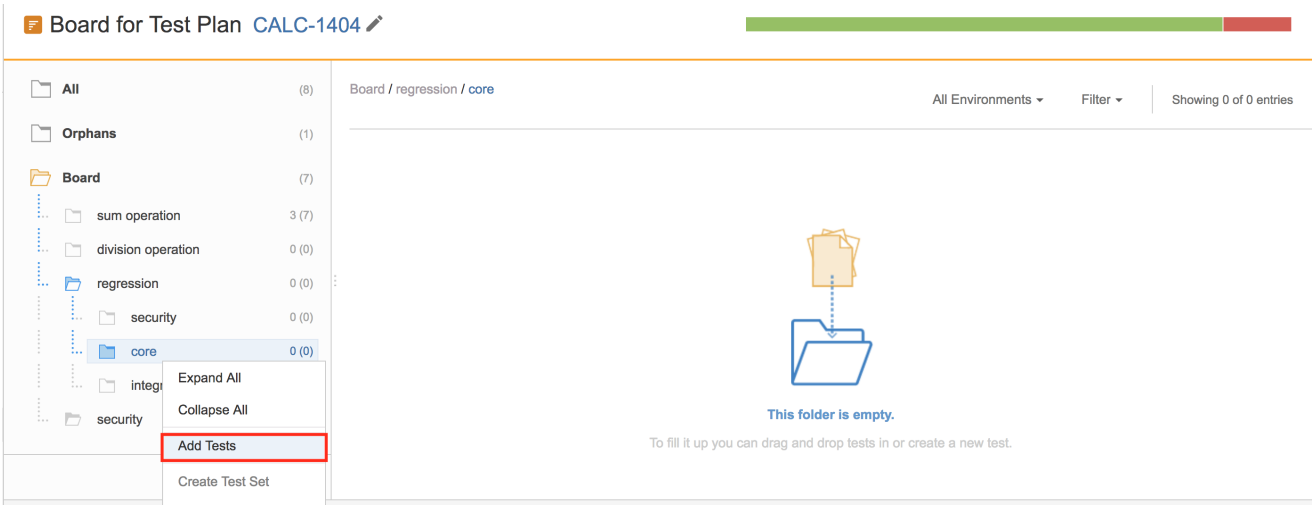
This action corresponds to "moving" them from any folder they may already be in (including the Orphans) to the destination folder. Thus, if you "add" a Test that is currently in some folder within the Board, to a destination folder, then it will be essentially be moved from the source folder to the destination folder. Note that the Test must already be part of the Test Plan.

If you want to add Tests to the Test Plan, then you need to go to the Test Plan issue screen and use the **Add Tests** button there.

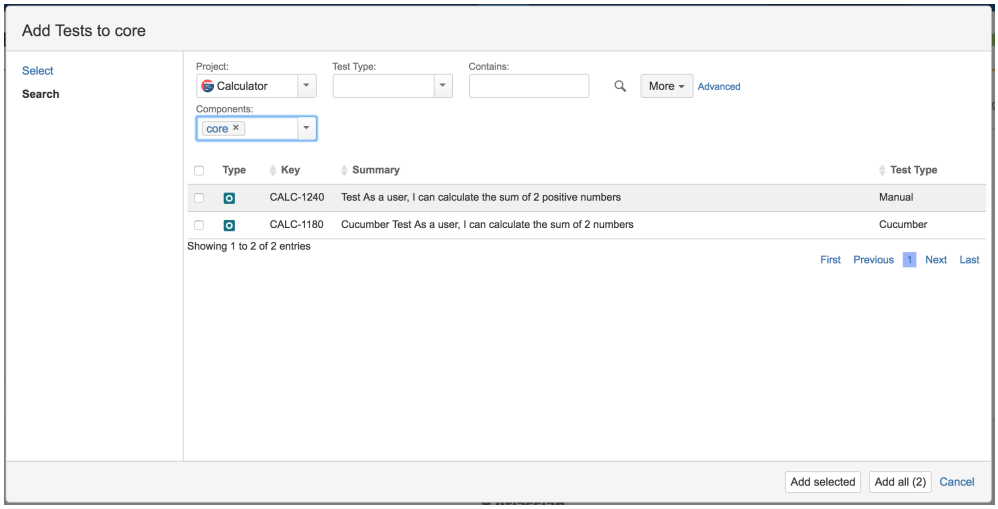
In order to "add" Tests to a folder:

Step 1: Click on the folder.

Step 2: Use the context action **Add Tests.**



Step 3: Choose the Tests you want using the provided filters, a previously saved filter, or by JQL.



Note: If you try to add non-Test issues or Tests that are not part of the Test Plan (e.g., by using a saved filter), an error message will be displayed.

Create Test Set

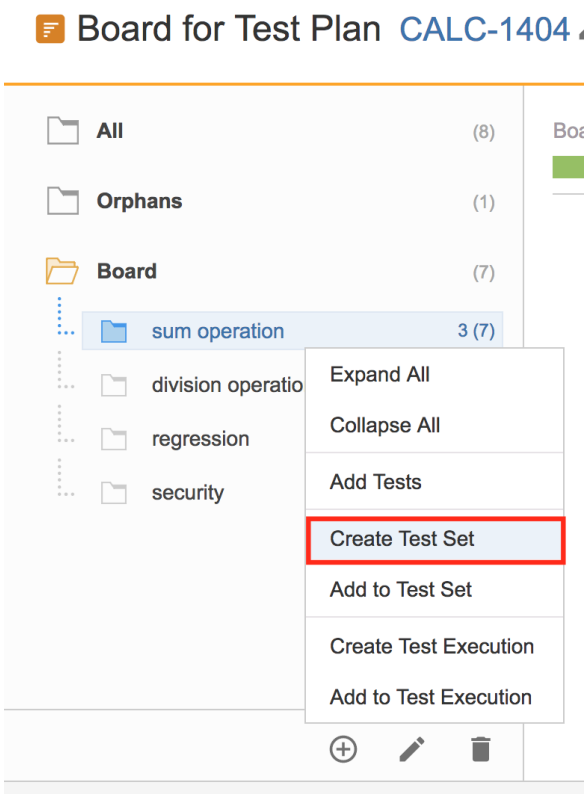
Users can easily create a Test Set with all the Tests in a given folder and its descendant folders.

The ranking of the Tests within the Test Set will respect the ranking they have in the Test Repository folder.

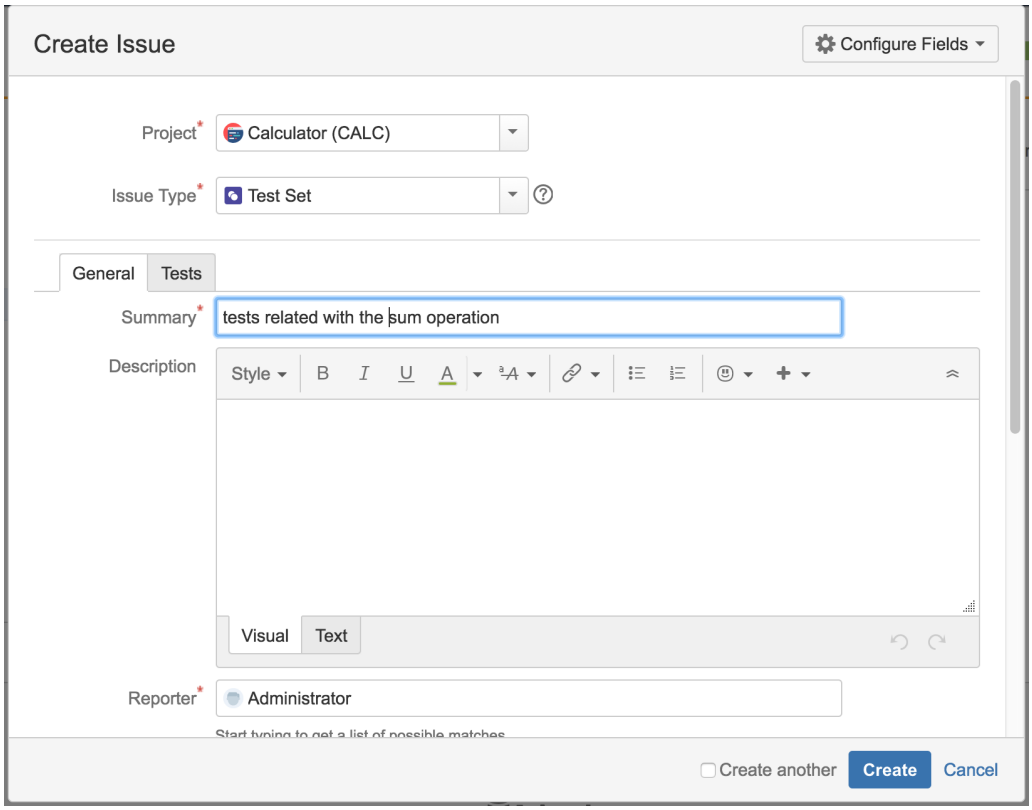
In order to create a Test Set with all the Tests of a given folder, including its descendants:

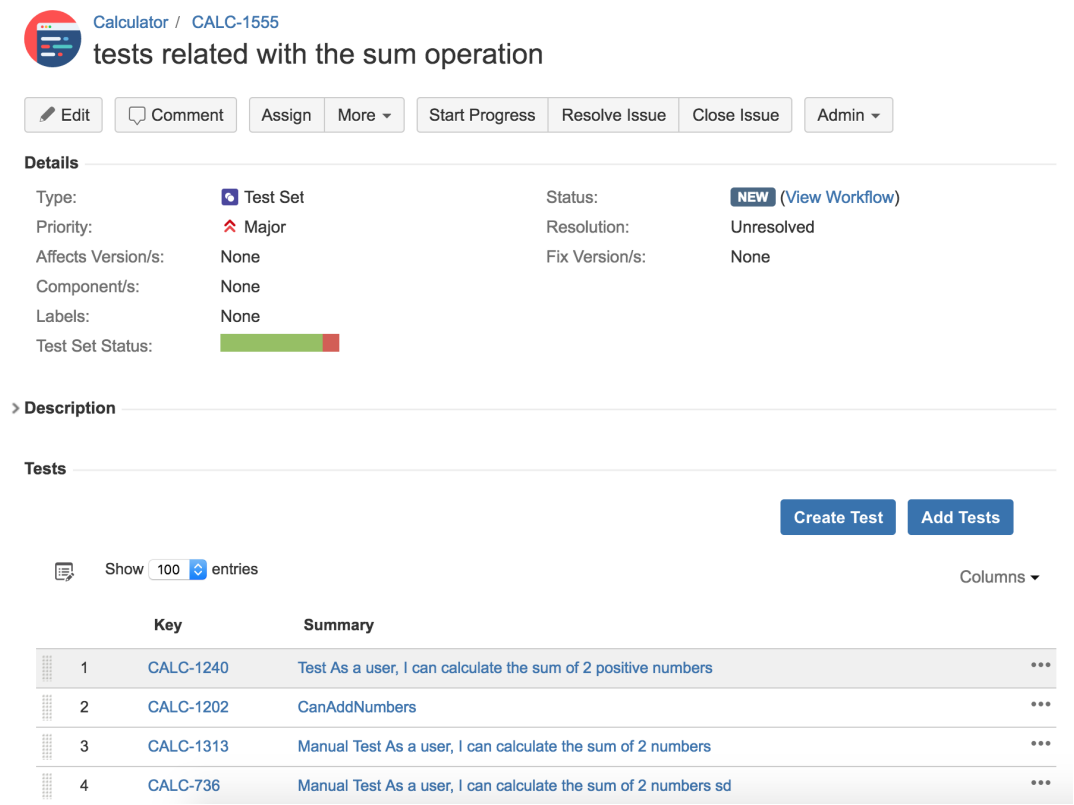
Step 1: Click on the folder.

Step 2: Use the context action **Create Test Set**.



Step 3: Fill out the Test Set fields and click **Create**. Your brand-new Test Set is created with all the Tests, in the proper order.





Add to Test Set(s)

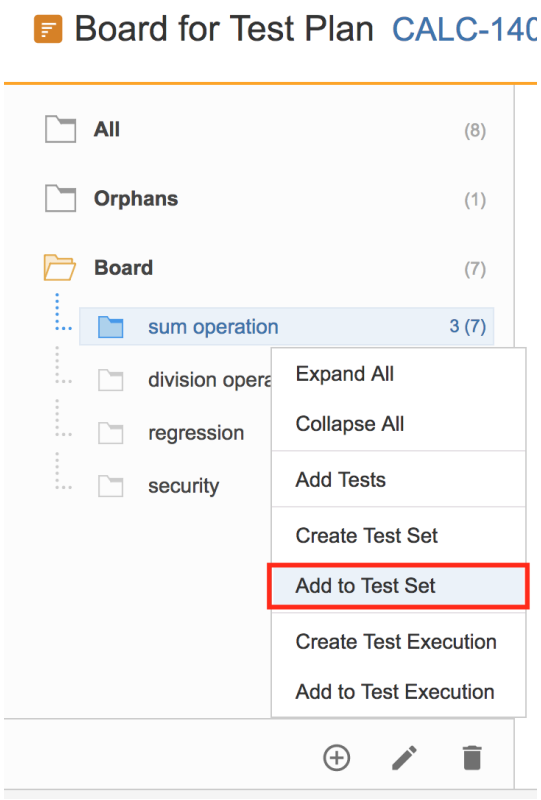
Users can add Tests to an existing Test Set with all the Tests in a given folder and its descendant folders.

The ranking of the Tests within the Test Set will respect the ranking they have in the Test Repository folder. If Tests already exist in the destination Test Set, their ranking in the Test Set is not changed.

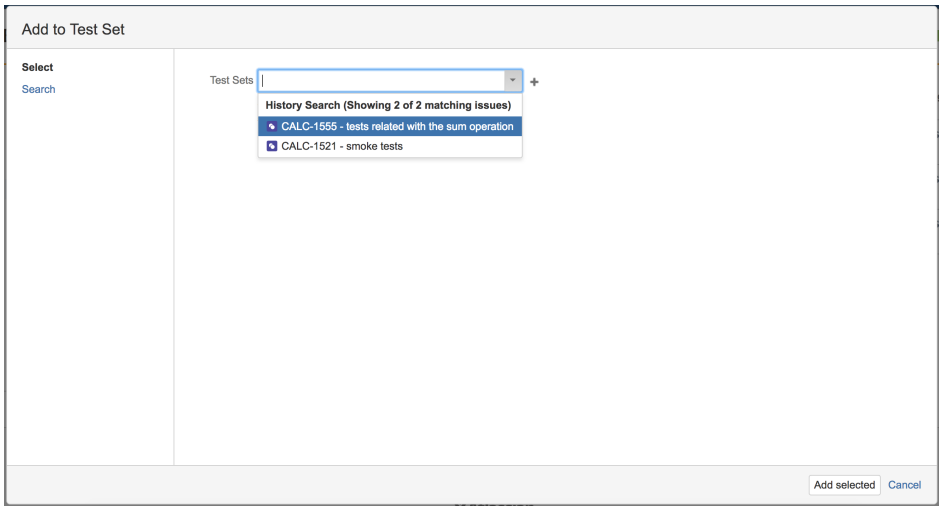
In order to add Tests from a folder, including its descendants, to an existing Test Set(s):

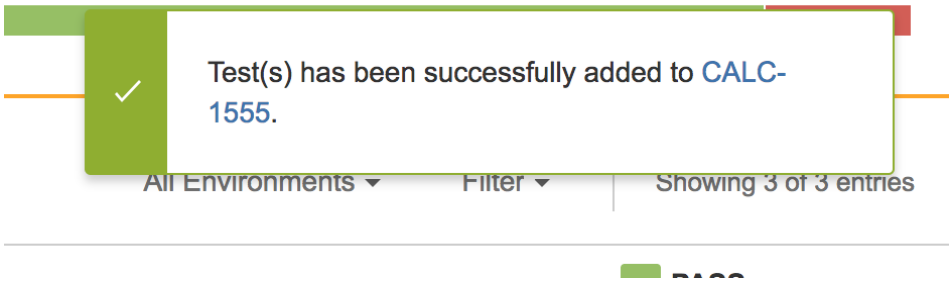
Step 1: Click on the folder.

Step 2: Use the context action **Add to Test Set.**



Step 3: Choose the Test Set(s) key(s) and select **Add selected**. The Test Set(s) will now be updated.





Create Test Execution

You can easily create a Test Execution with all the Tests in a given folder and its descendant folders. This Test Execution will automatically be linked to the Test Plan.

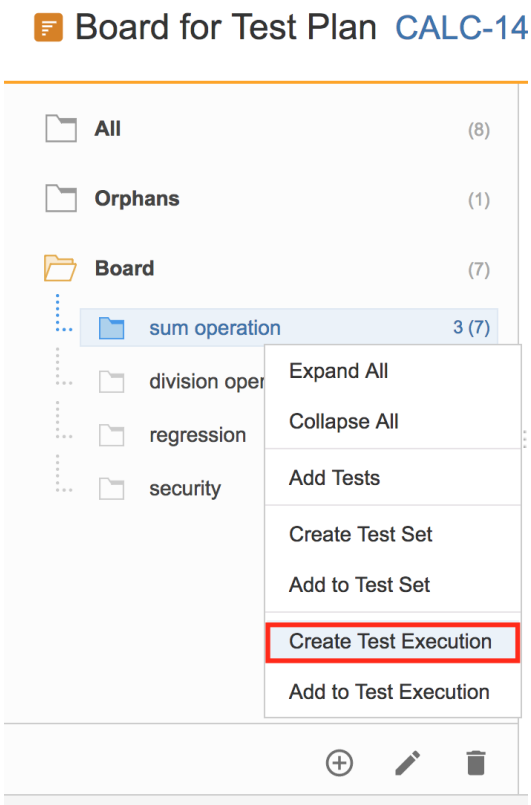
The ranking of the Tests within the Test Execution will respect the ranking they have in the Board folder.

> **Please note**
>
> In order to create a related Test Execution from the Test Plan, the user must be allowed to the edit the current Test Plan since the results on the Test Execution will affect the consolidated information shown at the Test Plan. The user will only be able to create Test Executions in certain projects, therefore the list of projects shown in the creation dialog will be filtered out accordingly.

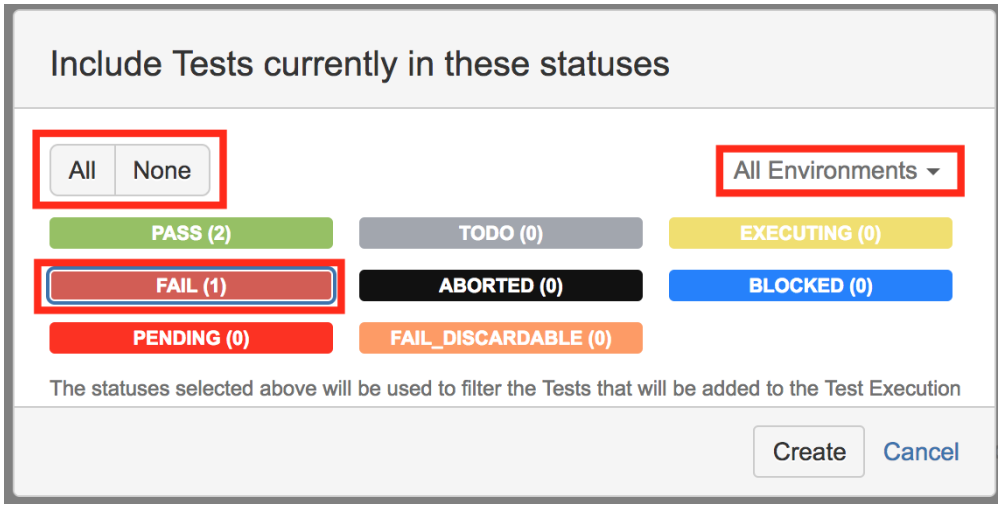
In order to create a Test Execution with all the Tests of a given folder, including its descendants:

Step 1: Click on the folder.

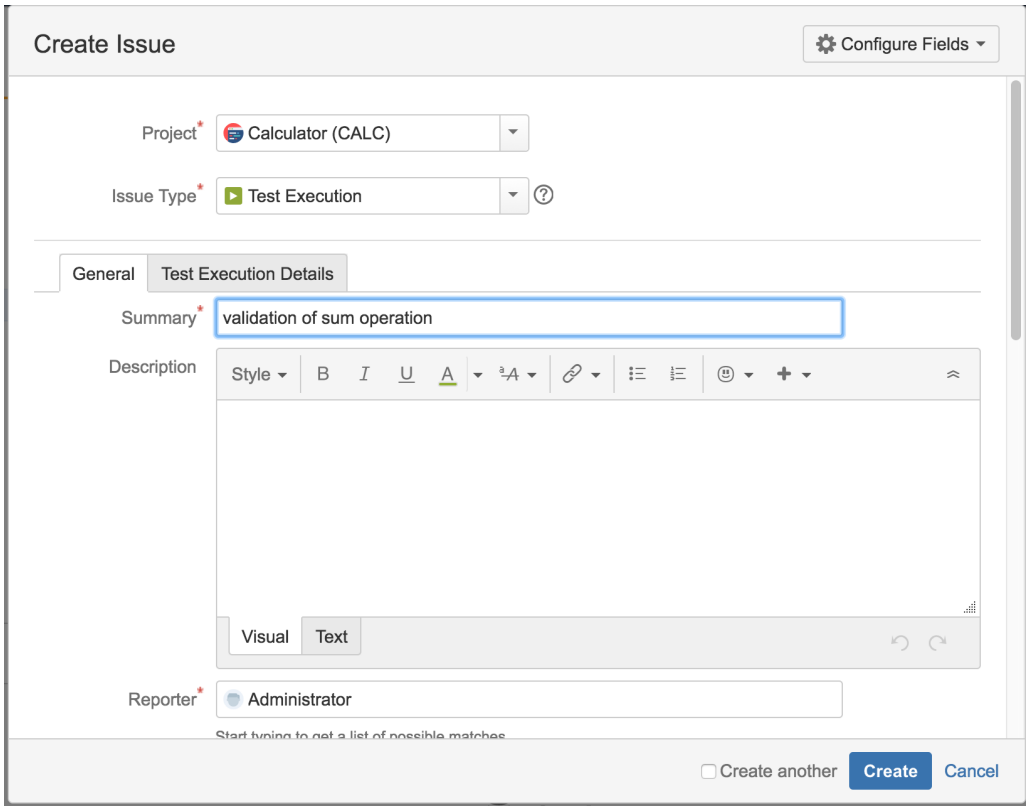
Step 2: Use the context action **Create Test Execution.**

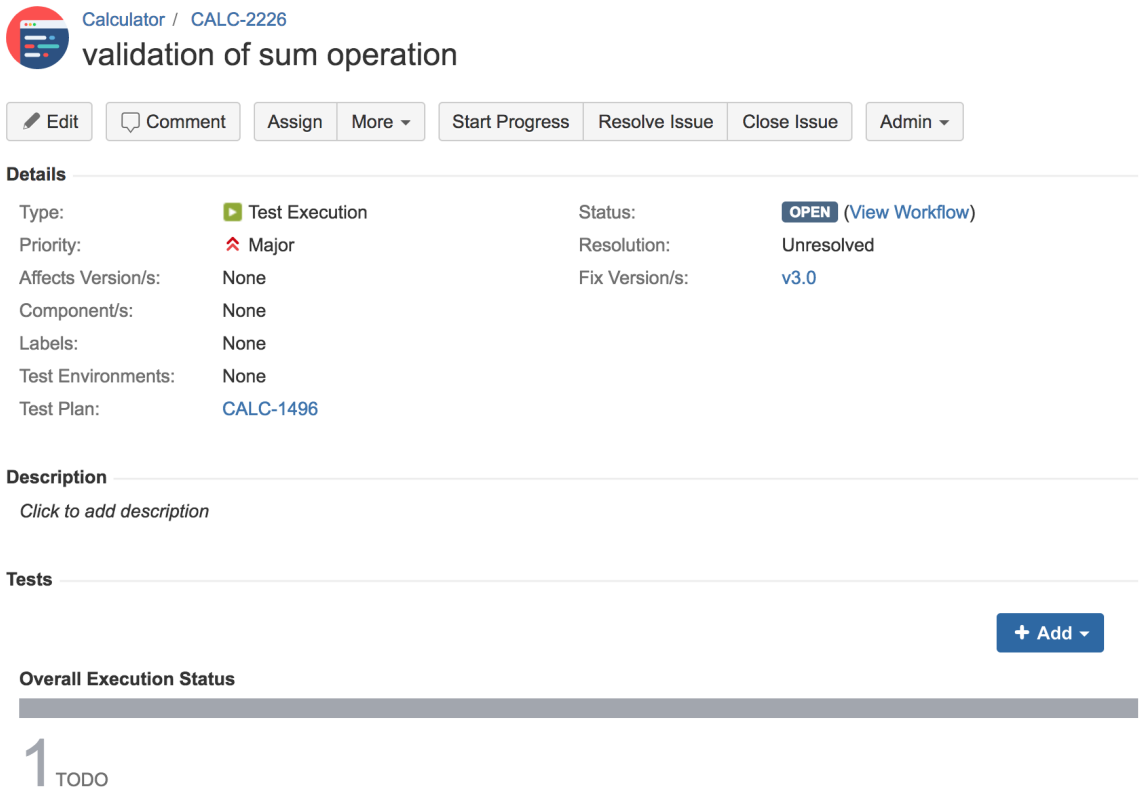


Step 3: Choose the Tests based on their consolidated status in a specific Test Environment. You can choose all Tests using the top left-side option; the Test Environment can be chosen in the top right-side option. For all shown status, you can see the amount of Tests that are currently in that consolidated status. You may choose one or more statuses. In the example below, we will be including just the (1) Test that is currently failing.



Step 4: Fill out the Test Execution fields and click **Create**. Your brand-new Test Execution is created with all the Tests, taking into account the previous selection, in the proper order.





Add to Test Execution(s)

You can add Tests to an existing Test Execution with all the Tests in a given folder and its descendant folders.

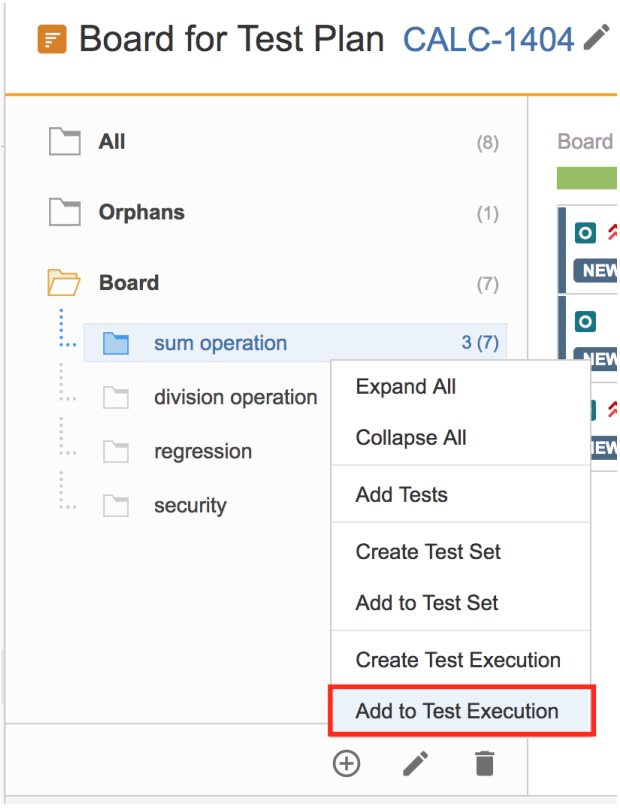
Note that the destination Test Execution will not be automatically linked to the Test Plan. If you want to link it, you will have to do it manually.

The ranking of the Tests within the Test Execution will respect the ranking they have in the Test Repository folder. If Tests already exist in the destination Test Execution, their ranking in the Test Execution is not changed.

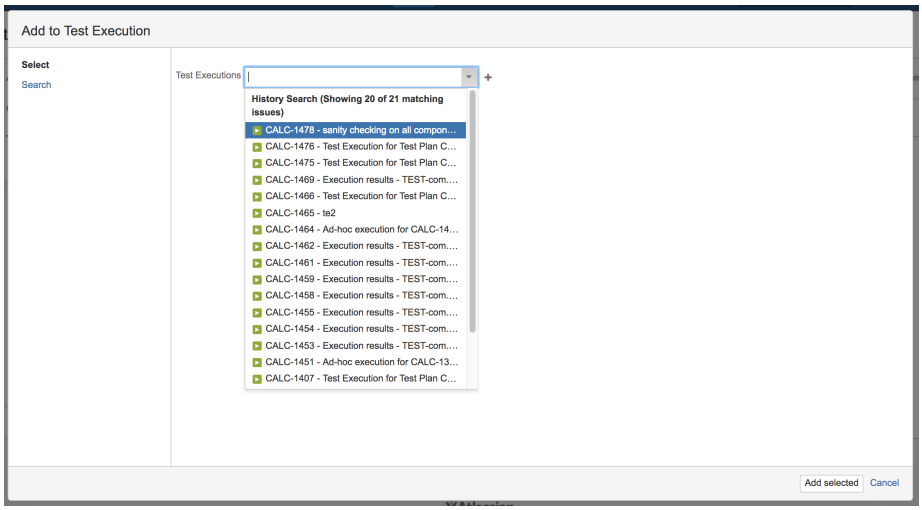
In order to add Tests from a folder, including its descendants, to an existing Test Execution(s):

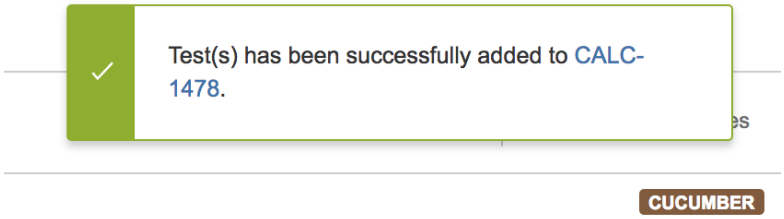
Step 1: Click on the folder.

Step 2: Use the context action **Add to Test Execution.**



Step 3: Choose the Test Execution(s) key(s) and select **Add selected**. The Test Execution(s) will now be updated.



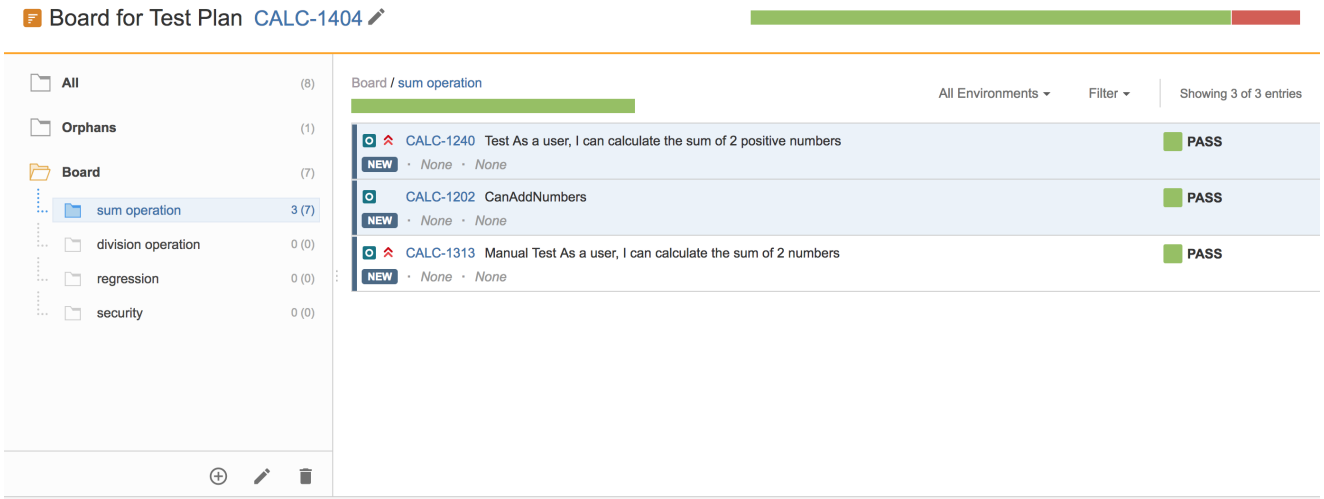


Tests Actions

Tests can be selected by clicking on them. Multiple selection is possible by using the "Ctrl" key (on Windows) or the "Cmd" key (on OS X). If you want to select more than one Test and the Tests are listed consecutively, use the "Shift" key to quickly select an entire group. Click the first Test in the list you want to select, hold down the "Shift" key, scroll down to the last Test you want and click it. This selects the first item, the last item and all items in between.

You can also filter the list of visible Tests to make it easier to pick the Tests you need.

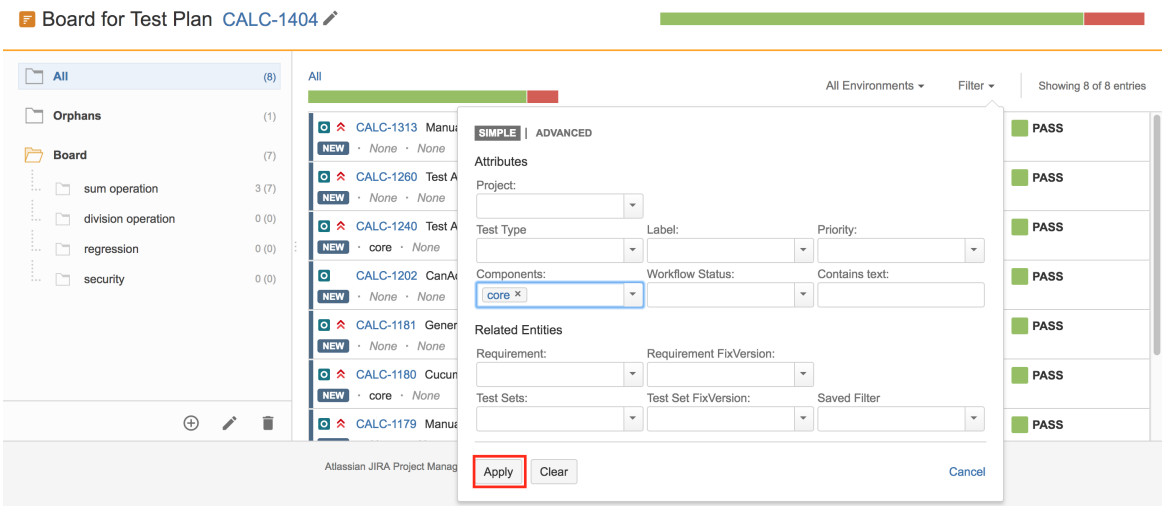
After selecting one or more Tests, context actions can then be done on them, such as creating a Test Set, Test Execution, etc.

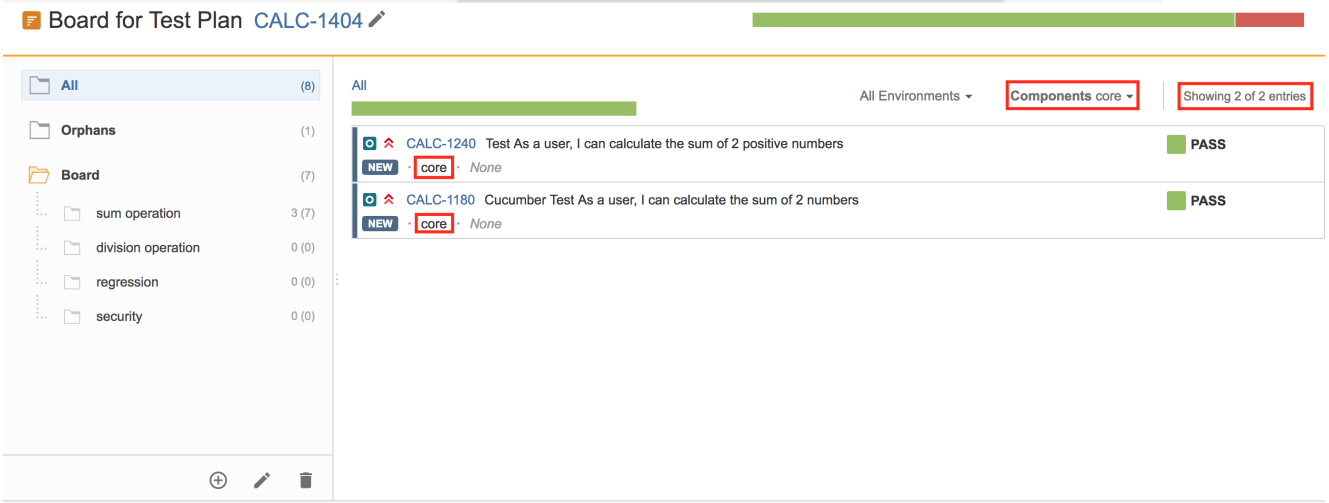


Filtering visible Tests

The list of visible Tests can be filtered, so you can easily see and obtain the relevant Tests you need. Note that the filter is applied if you change to another folder.

Filtering Tests is quite useful, for example, when creating the structure of the Board based on a subset of Tests from the All or Orphans meta-folders.

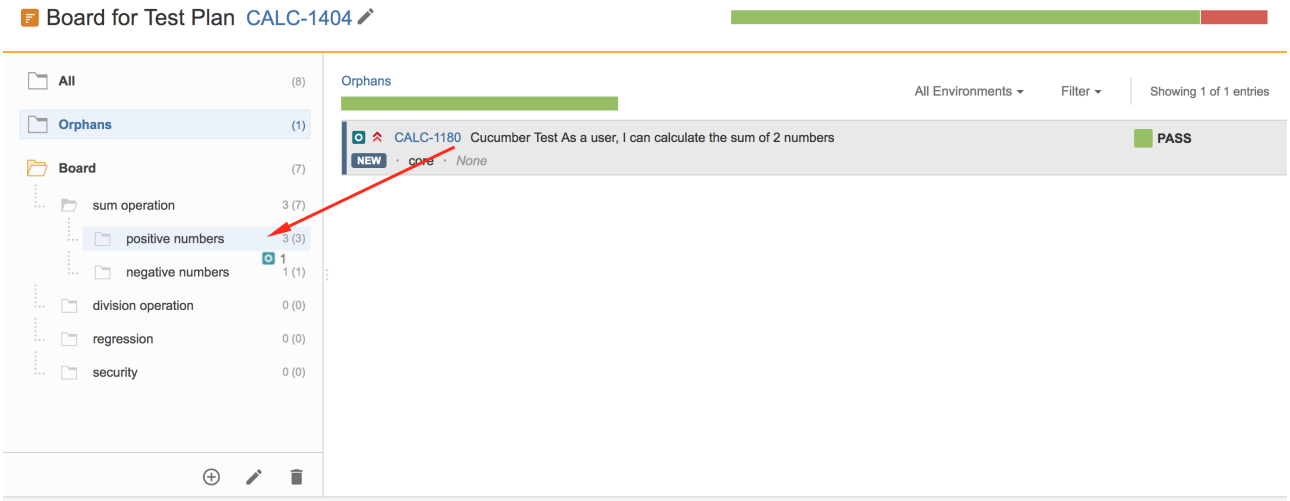




Moving to another folder

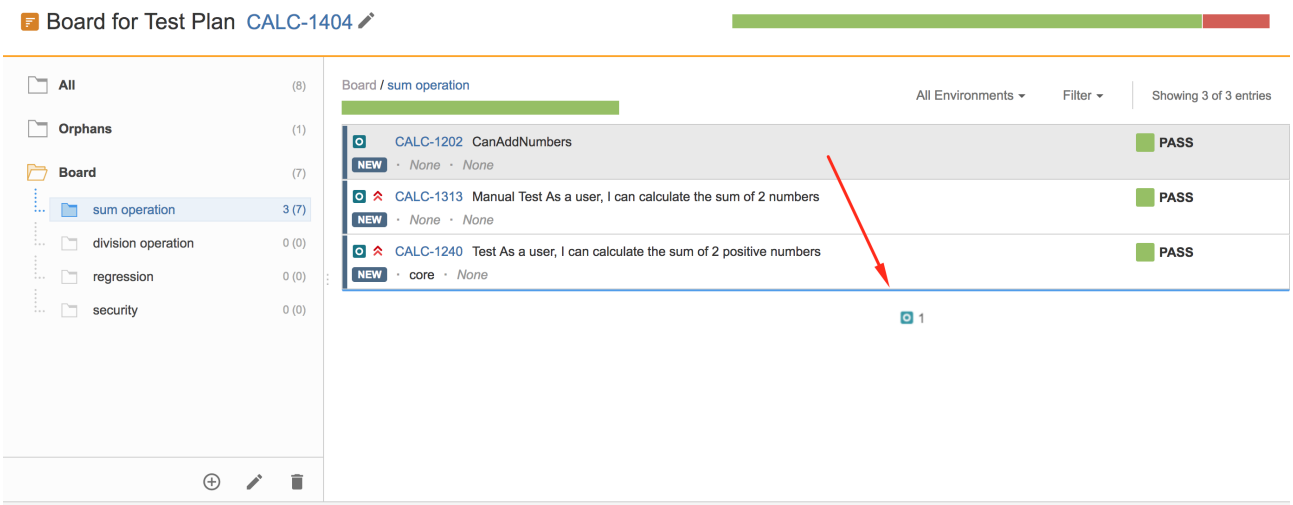
You can move Tests to another folder by using drag-and-drop to the destination folder.

You can also use this operation for "adding" Tests (i.e. moving Tests) from the meta-folders (i.e. All, Orphans) to folders within the Test Repository.



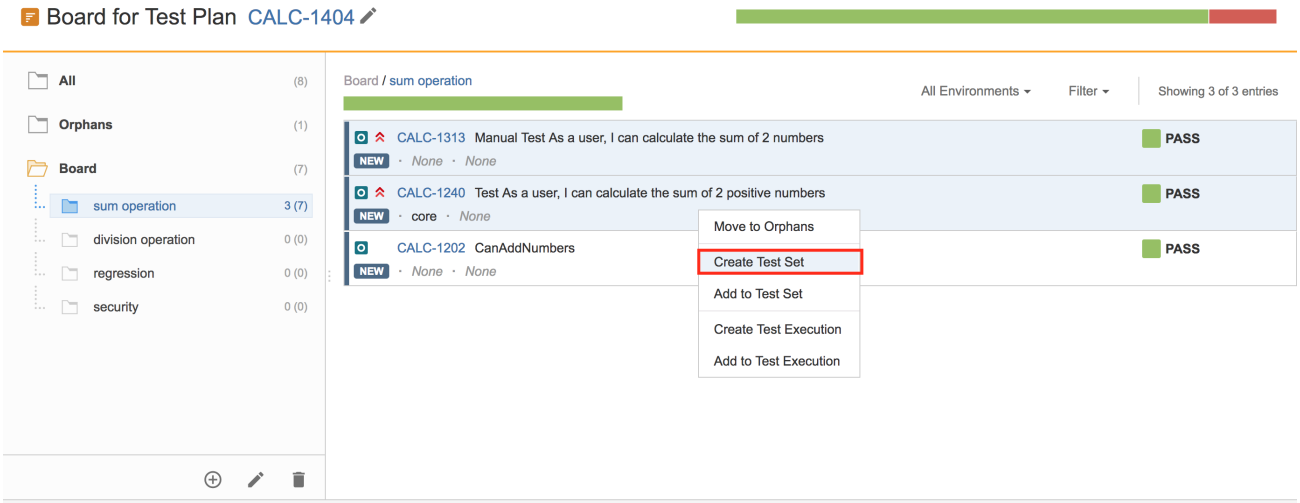
Ordering / Ranking

Tests can be ranked within a folder by using drag-and-drop.



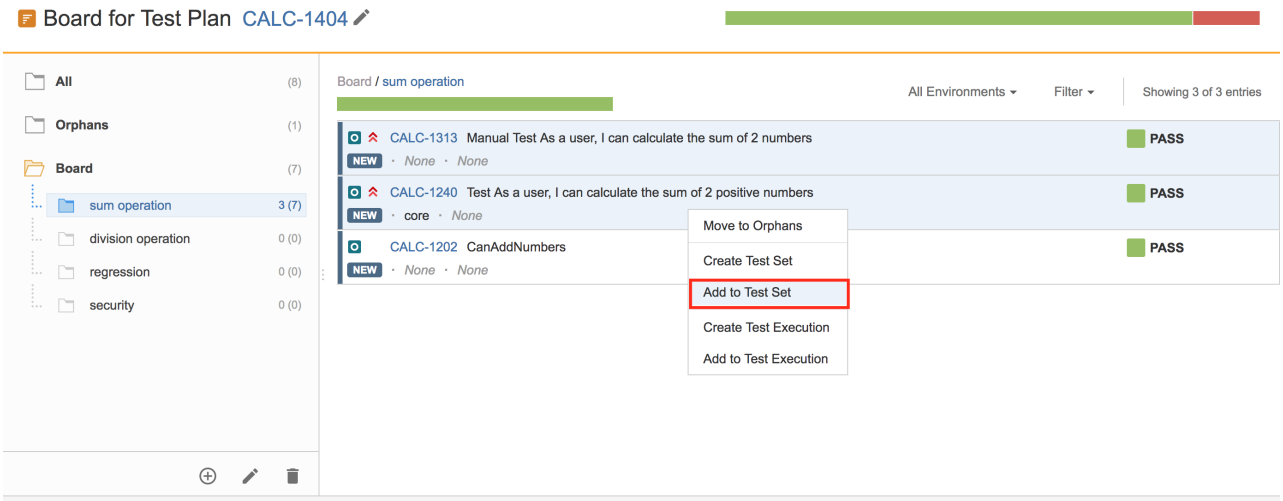
Create Test Set

Use the context action **Create Test Set** to create a new Test Set containing the selected Tests.



Add to Test Set(s)

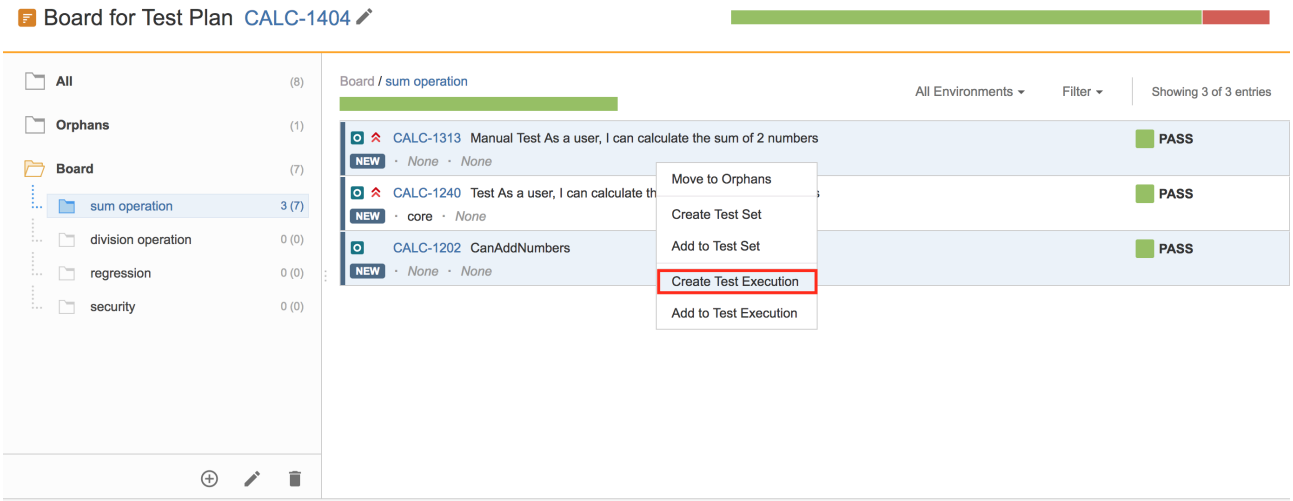
Use the context action **Add to Test Set** to add selected Tests to an existing Test Set.



Create Test Execution

Use the context action **Create Test Execution** to create a new Test Execution containing the selected Tests.

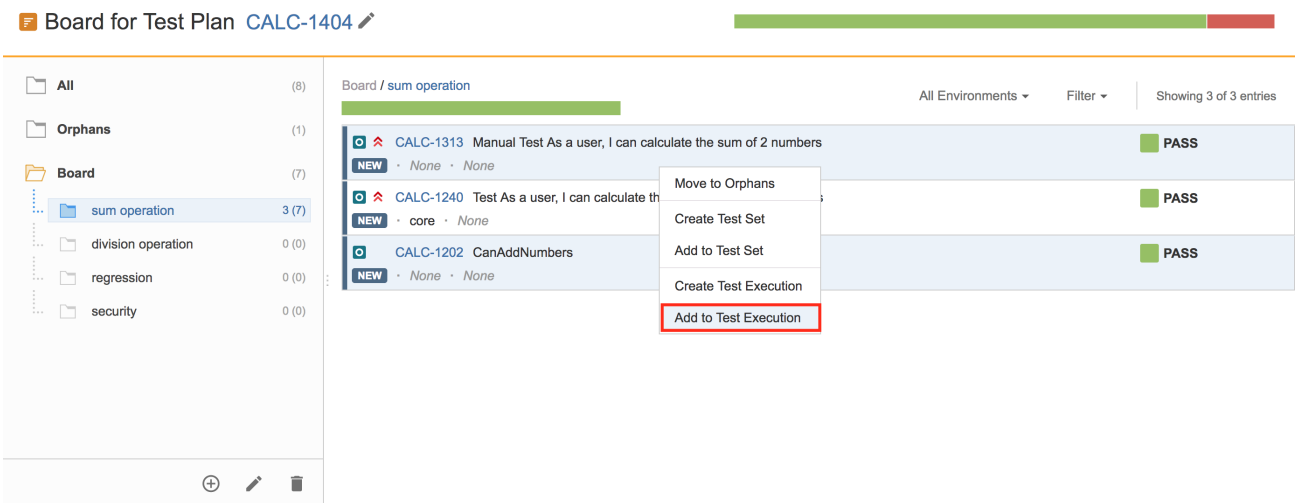
Note that when creating a Test Execution from a folder, or selection of Tests, this Test Execution will be linked to the Test Plan.



Add to Test Execution(s)

Use the context action **Add to Test Execution** to add selected Tests to an existing Test Execution.

Note that the destination Test Execution will <u>not</u> be automatically linked to the Test Plan. If you want to link it, you will have to do it manually.



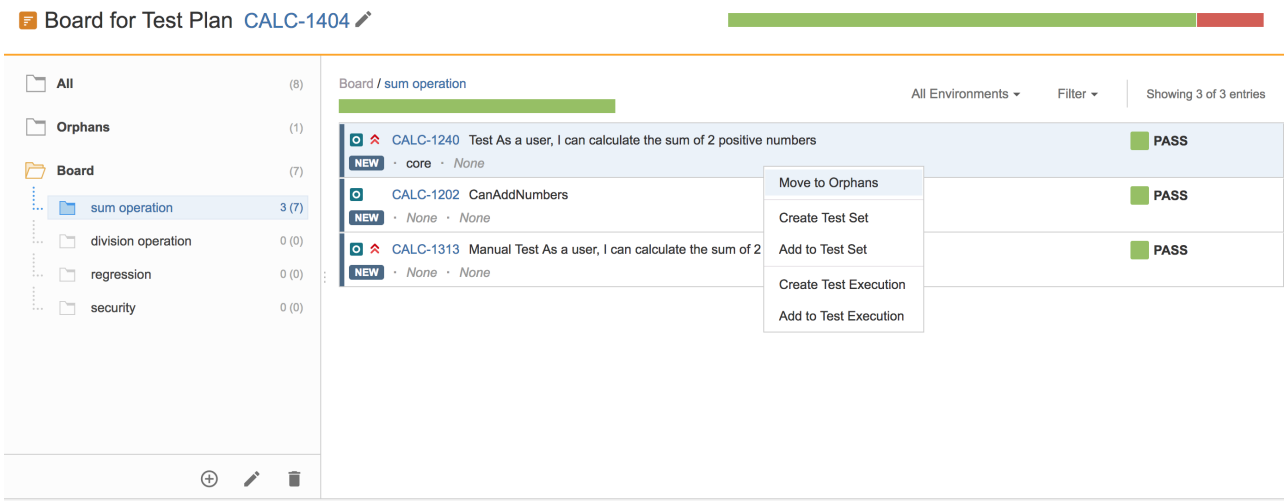
Move to Orphans

You can move Tests to the Orphans folder, which is is equivalent to removing them from the Board.

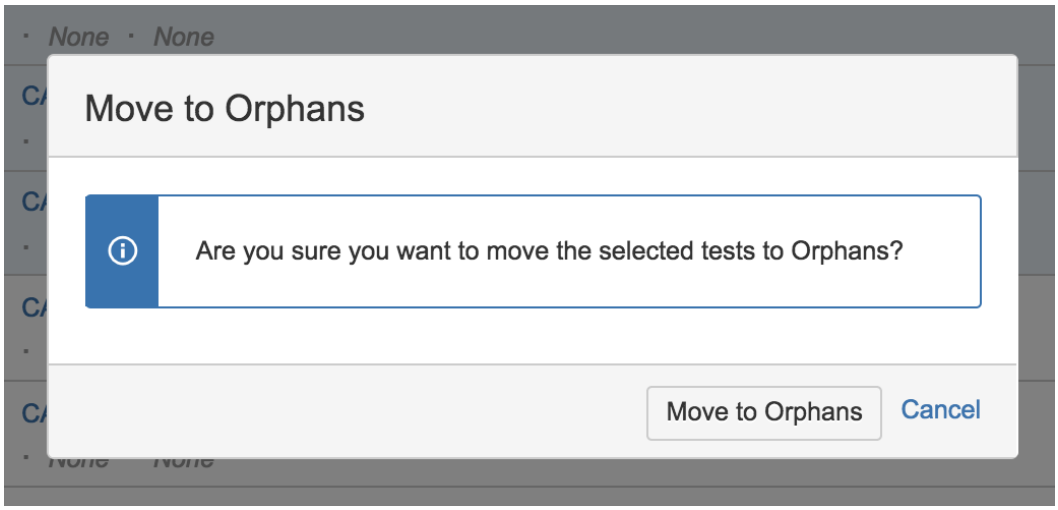
In order to move Tests to the Orphans meta-folder:

Step 1: Select the Tests you want.

Step 2: Use the context action **Move to Orphans**



Step 3: Confirm by clicking on **Move to Orphans.**

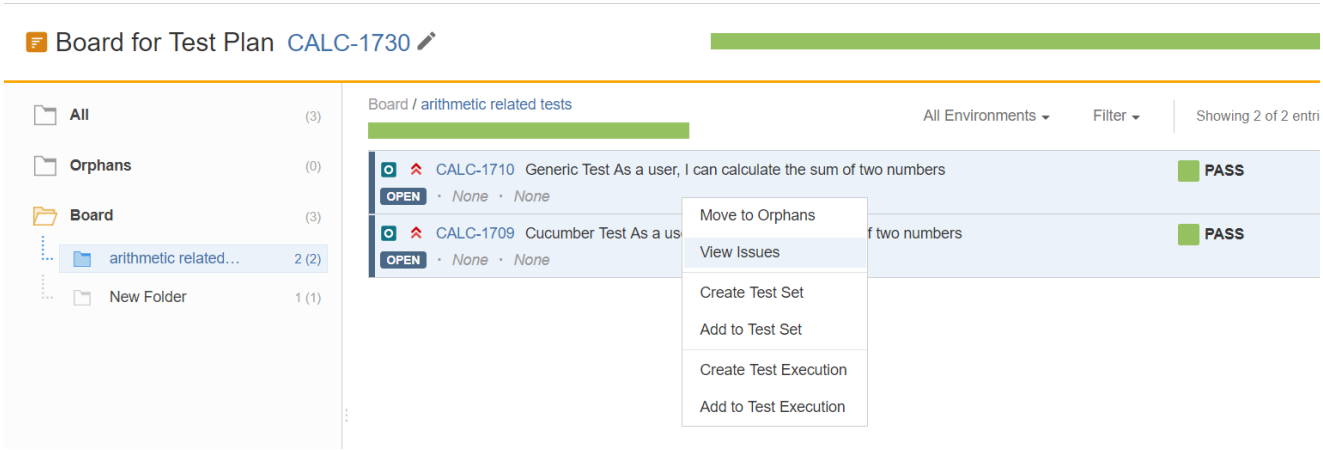


View Issues

You can use the context action **View Issues** to view the selected Tests in the search issues page.

Step 1: Select the Tests you want.

Step 2: Use the context action **View Issues**.



How ranking works when creating, or adding Tests to, Test Sets, Test Executions or Test Plans

Whenever creating a Test Set, Test Execution or Test Plan, or adding Tests to an existing one, Xray will respect the order that the Tests have in the Board.

The algorithm starts by adding the Tests of the folder, respecting their rank in the folder, and then iterates through the child folders. Each child folder is processed the same way.

If a Test already exists in the destination entity (e.g., Test Set/Execution), then it is not added again and the current ranking is maintained.