Quick Guide for QA Managers

1

Decide your project organization strategy

Select the best approach to match your QA strategy with Jira project configuration.

	Advantages	Disadvantages
All-in-one project Requirements, Defects and Tests in the same Jira project	✅ Info all together and visible to the whole team ✅ Same context - testers and developers ✅ Less administration work ✅ Simple to understand	❌ Extra info that may be confusing to the team
Separated projects Separate Tests from Requirements and Defects	✅ Dedicated project for Testers ✅ Less information inside the project ✅ Permissions can be more granular	❌ Extra administration effort ❌ May promote a team split

If you want to go for the easiest and simplest approach go for the all-in-one project.

2

Share your strategy with your Jira Admin

Once you know how you will organize your project, share your choice with your Jira admin and ask them to perform the needed actions for setup:

- Enable Xray for existing projects or
- Create new projects

3

Select your Planning Strategy

When designing your planning strategy you will decide which tests you want to perform, and who and when will execute the tests. Also, you may want to prioritize some of the tests and focus on specific requirements.

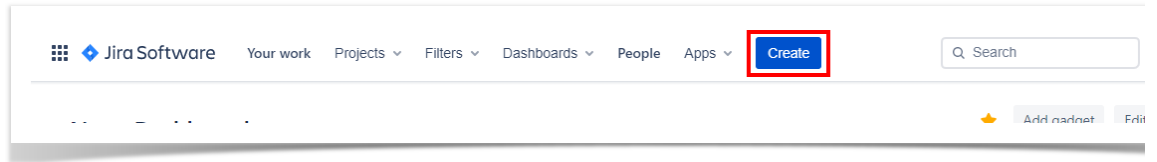Your planning strategy must reflect your methodology, here are some options:

✅ SCRUM based approach - Create one Test Plan per Sprint

✅ Feature Approach - Create one Test Plan for the features (maybe epics in Jira) you are able to address at your WIP. More suitable to Kanban.

✅ Release Approach - Create one Test Plan per release (Fix version in Jira) or interim release/milestone. More suitable to waterfall methodology.

✅ Test Categories Approach - Create one Test Plan per category of tests, for example, Regression Tests, Security Tests, Non-functional tests.

Check the next step to see how to Create a Test Plan.

4   Create a Test Plan

1. Click "Create" button and select the **Test Plan** issue type.

2. Besides the **Summary**, you may want to fill the **Fix Version** field to indicate that you're tracking the results of the Tests for a specific version. This only makes sense if you have multiple versions.

Create issue

Configure fields ⌄

Project *
🔲 Book Store (STORE) ⌄

Issue Type *
🟧 Test Plan ⌄ ⓘ

Some issue types are unavailable due to incompatible field configuration and/or workflow associations.

Summary *
[   ]

Revision
[   ]
The system revision for the test execution

Begin Date
[   ] 📅
The planned start date

End Date
[   ] 📅
The planned end date

Environment

Style⌄ B I U A⌄ ªA⌄ 🔗⌄ 📎⌄ ☰ ☰ ☺⌄ ✛⌄   ⌃

[   ]

▤ ⓘ
For example operating system, software platform and/or hardware specifications (include as appropriate for the issue).

Components
[   ] ⌄
Start typing to get a list of possible matches or press down to select.

Attachment
[☁ Drop files to attach, or browse.]

Description

☐ Create another   **Create**   Cance

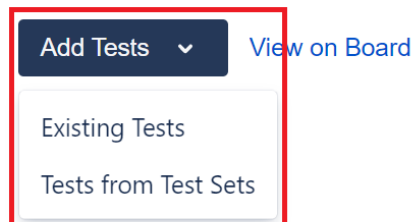3. After creating the Test Plan you can add Tests.

Tests

Tests | Test Executions

This test plan doesn't have any tests

The purpose of a test plan is to provide better visibility and management over your tests for a given scope. You can add existing tests or test sets to this test plan.

Add Tests ▾   View on Board

Existing Tests

Tests from Test Sets

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

Click **Add selected** or **Add all** button.

Add Tests to Test Plan STORE-43

Select   Search   JQL

Project
Book Store

Folder

Test Type
Select...

Fix Version/s
Select...

Covering
Select Issues

Covering Fix Version
Select...

Component
Select...

Label
Select...

Status
Select...

Saved Filter

	Key ▾	Summary ⇕	Status ⇕
☐	STORE-80	Password validation	TO DO
☐	STORE-76	T2	TO DO
☐	STORE-75	T1	TO DO
☐	STORE-69	Add item to cart	TO DO
☐	STORE-68	Search for articles by keyword	TO DO
☐	STORE-67	Search for articles by shop name	TO DO
☐	STORE-66	Should be able delete pets from a store using json map	TO DO
☐	STORE-65	Should be able to add pets to a store	TO DO
☐	STORE-64	Should be able delete pets from a store	TO DO
☐	STORE-63	Display product details from the search list	TO DO
☐	STORE-59	Clear	TO DO
☐	STORE-58	Longer calculation	TO DO
☐	STORE-57	Simple calculation	TO DO
☐	STORE-56	Push multiple buttons	TO DO
☐	STORE-55	Push button	TO DO
☐	STORE-54	Addition	TO DO
☐	STORE-53	Calculation error	TO DO
☐	STORE-52	Failing	TO DO
☐	STORE-51	Division	TO DO
☐	STORE-50	Multiplication	TO DO
☐	STORE-49	Subtraction	TO DO
☐	STORE-48	Addition	TO DO

Prev   **1**   2   Next

Clear   Search   Add Selected   Add All (42)   Ca

ⓘ **Info**

In order to add Tests to your Test Plan, you need to have them created beforehand. Learn more about creating Tests in the Tester Onboarding Course.

---

5 Explore different possibilities to organize your Tests

You can organize tests using two different approaches:

- **Test Repository** - a project page which enables the hierarchical organization of Tests at the project level by allowing you to organize Tests in folders and sub-folders. You can also perform several actions from this page including, creating new Tests, creating new Test Plans, Test Sets, Test Executions for a group of Tests, etc. This is the recommended approach whenever you have a large number of Tests and want to manage them more effectively.

- **Test Set** - an issue type for organizing tests, and it is a flat list of Tests and is a simple way to create different groups of Tests. You can easily use them to add several Tests at once into Tests Plans or Test Executions.

---

6 Select your favorite reports

Xray provides several ways to make it easier for the entire team to have a clear view of the overall readiness of the project.

As part of your daily tasks, use the dedicated reports and gadgets available in your customized dashboard to evaluate your testing progress.

The most popular reports are:

Report	What do you get
Test Coverage Report	Provides the coverage status of requirements for a given scope (i.e. Version/Test Plan). • Analysis can be done by "Version" or by "Test Plan" and for a given Test Environment • Takes into account executions performed on that scope • Groups requirements by Component, Priority, etc
Traceability Report	Shows the requirement traceability, from requirements to defects. This helps you analyze the requirements and related Tests, Test Runs and defects, so you can quickly identify uncovered or incomplete/faulty requirements.
Test Plans Metrics	Shows a list of Test Plans with consolidated information for each one, including the test statuses count, overall progress and Test Environment-related metrics
Test Run List	Shows a list of Test Runs with detailed information for each one, including related Test, Test Execution and Test Plan entities, execution dates, and linked defects.

> ✅ If you want to analyze the current status of your release, you might find it useful to check the Test Coverage Report and the Traceability Report. You might also use these reports to perform an analysis by Test Plan, in that case it only takes into account results performed on that scope of the test plan.

1. Go to the **Testing Board** (inside your project) and select the report you want to see.

Explore and learn more by taking the QA Manager onboarding course.