Quick Guide for Testers

Before you start

Before you start, make sure your Jira Admin has performed the basic configuration.
If so:

1. You can create issues of issue types like: Test, Test Set, Test Plan and Test Execution
2. In your Requirements (issue type Story or any other that you have set up as a requirement) you will see the "Test Coverage" panel.

If you don't see this configuration, ask your Jira Admin to follow this quick setup.

1

Create a Test

Start by creating a regular "manual" scripted test case.

1. Click the **Create** button or **Create Test** from the "requirement."

blocked URL

Projects / Book Store / STORE-87

As a user, I want to have version control for documents

🔗 Attach   ☑ Create subtask   🔗 Link issue   ⌄   ≡ Test Coverage   •••

Description

Add a description...

Test Coverage   •••

No Tests are associated with this issue.   **UNCOVERED**

Create Test   Create Sub Test Execution

2. After the issue is created, **edit** the issue and in **Test Details** tab select the test type **Manual**.

Test Details   ...

| 📋 Test details | ◎ Preconditions | ◪ Test Sets | 🗐 Test Plans | ⟳ Test Runs |

Test Repository

Test Type

| Manual   ⌄ |

🎛 Dataset

There are no steps defined

A test is a sequence of steps coupled with conditions, test inputs and
expected results. Create or import test steps to define the test.

Create Step   Open Dialog   Import ⌄   ⓘ

3. Then click on **Create Step** to start creating the Test Steps where you can define the action to be reproduced by the tester,
data to be used by the tester, expected results and add attachments.

Test Details   ⋯

| Test details | Preconditions | Test Sets | Test Plans | Test Runs |

Test Repository

Test Type

| Manual ▾ | ⊞ Dataset

⤢ ⤢ 🔍 ⓘ   **+ Create Step**   ⋯

1	**Action*** Aa▾ **B** *I* ⋯ A▾ ≣▾ +▾ ${▾ ⌀▾
	Data Aa▾ **B** *I* ⋯ A▾ ≣▾ +▾ ${▾ ⌀▾
	Expected Result Aa▾ **B** *I* ⋯ A▾ ≣▾ +▾ ${▾ ⌀▾
	Create Cancel

+ Create Step

4. Confirm that your Test is linked with a requirement. In order to analyze coverage, you need to link your tests with requirements. Go to Link issues tab, or check it **Linked Issues**.

Projects / 📚 Book Store / ▣ STORE-88

Test As a user, I want to have version control for documents

| ⌀ Attach | ☑ Create subtask | 🔗 Link issue | ▾ | ⚡ Test Details | ⋯ |

Description

Add a description...

Linked issues   +

tests

| ▣ STORE-87 As a user, I want to have version control for documents   ↑ 👤 TO DO ▾ |

Want to know how to create an automated Test or a generic Test (unstructured)? Check out the [Tester Onboarding Course](#).
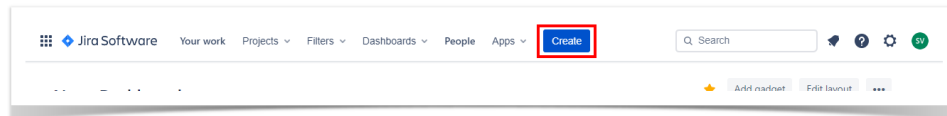
---

② Plan Tests

> ⓘ **Info**
>
> This activity can be performed by a QA Manager, if so, you should ask for the creation of the Test Plans.

With Test Plans you will decide which Tests you want to perform, who will execute them and when they will be executed.
Also, you may want to prioritize some of the Tests and focus on specific requirements.
Test Plans are used to define the scope of your testing, track and consolidate the related results, no matter how many times you've run the tests.

1. Click **Create** button and select **Test Plan** issue.

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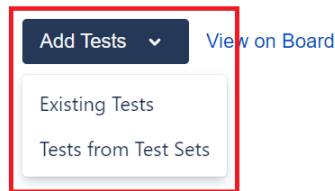
Create issue

Configure fields ⌄

Project *
🏳️ Book Store (STORE) ⌄

Issue Type *
🟨 Test Plan ⌄ ⑦
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 ⌄ 🔗 ⌄ 📎 ⌄ ☰ ☰ ☺ ⌄ ＋ ⌄   ≪

[   ]

🔲 ⑦
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

Style ⌄ **B** *I* U A ⌄ ᵃA ⌄ 🔗 ⌄ 📎 ⌄ ☰ ☰ ☺ ⌄ ＋ ⌄   ≪

[   ]

🔲 Create another **Create** Cancel

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

4. 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**.

3 Execute Tests

The easiest way to execute your tests is directly from the Test Plan, but you can also perform ad-hoc Test Executions directly from a Test, or even create a new Test Execution issue.

1. Inside the **Test Plan**, click on **Create Test Execution**.

Projects / 📕 Book Store / 🟧 STORE-43

Test Plan for v1.0 release

📎 Attach   ☑ Create subtask   🔗 Link issue   ⌄   ⚡ Tests   •••

Description

Add a description...

Tests   •••

⭕ Tests   ▶ Test Executions

Add Tests ⌄   Create Test Execution ⌄   View on Board

2. Go to **Test Execution**, and click on **Execute** (play button).

	Rank ↑	Key ⇕	Summary ⇕	Test Type ⇕	Dataset	Status ⇕		Actions
☐	1	STORE-88	Test As a user, I want to have version control for documents	Manual	🔲	▨ TO DO	▶	•••

Prev   **1**   Next   Total **1** issues

3. You are now at the Test Execution Screen, and from here you can follow the test steps and set the execution status: **TODO**, **EXECUTING**, **FAIL** and **PASS.**

Test As a user, I want to have version control for documents

Dataset | Import Execution Results

Execution Status	Started On	Assignee	Versions	Test Environments
EXECUTING	17/May/2021 06:03 PM	Melanie Castro	1.0	Chrome
	Finished On	Executed By	Revision	
	-	Melanie Castro	-	

> Findings ⊕

Test details MANUAL

⌄ Test Issue Links ①

tests

🔲 STORE-87 As a user, I want to have version control for documents ↑ TO DO

⌄ Steps ③

1

Action	Data	Expected Result
I choose the operation of the calculator: **Subtraction**	None	The operation must appear selected

Actual Result ⇕   Comment ✏   Defects ⊕   Evidence ⊕

Step State ▮ PASSED

2

Action	Data	Expected Result
I enter the input into the calculator	I1: 5	Input successfully added
	I2: 6	

Actual Result ⇕   Comment ✏   Defects ⊕   Evidence ⊕

Step State ▮ PASSED

3

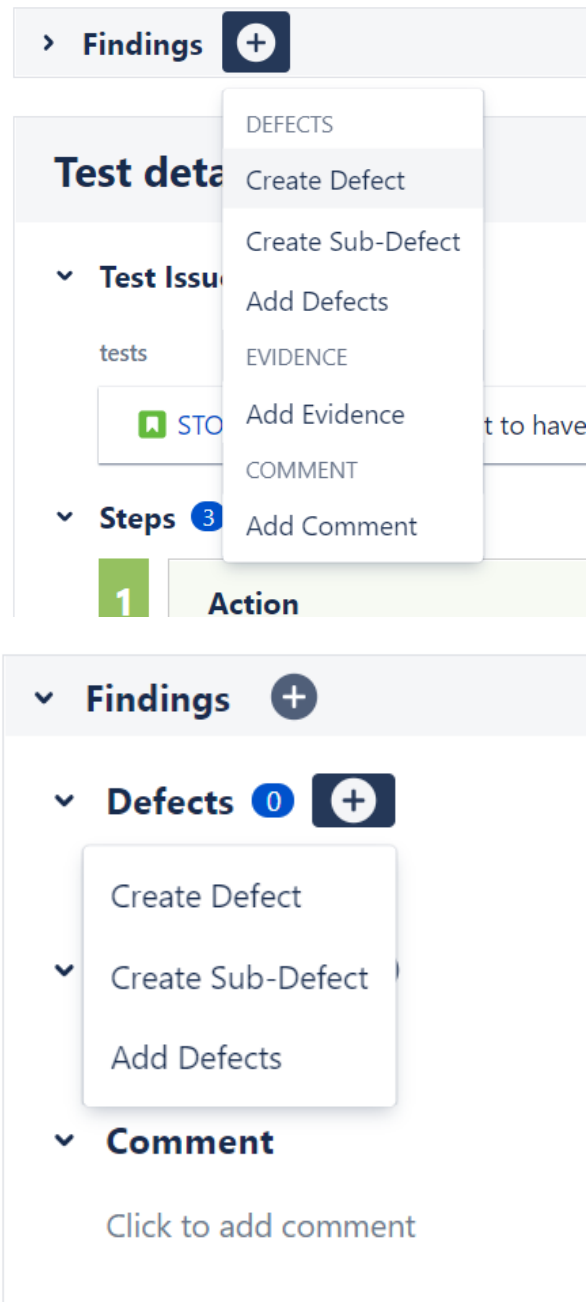| Action	Data	Expected Result
I press the Calculate button	None	The result 3 is displayed in the screen, on the right of the = sign

Actual Result ⇕   Comment ✏   Defects ⊕   Evidence ⊕

Step State ▮ EXECUTING

> Activity

4. Did you find a defect and want to report it? Create Defects from the Test Execution Screen, click on + button in the **Findings** section and select **Create Defect** (or expand the **Findings** section and in the **Defects** panel select **Create Defect)**

Besides defects, you can also add evidence of your test results, at "**Evidence +** ".

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④ Analyze results

1. Go to the **Requirement** issue page and check the **Test Coverage**.

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📎 Attach   ☑ Create subtask   🔗 Link issue   ⌄   ☰ Test Coverage   •••

Description

Add a description...

Linked issues   +

is tested by

🔘 STORE-88 Test As a user, I want to have version control for documents	↑	🧑	TO DO ⌄

Test Coverage   •••

Create Test   Create Sub Test Execution

Calculate the Test Coverage for the following scopes.

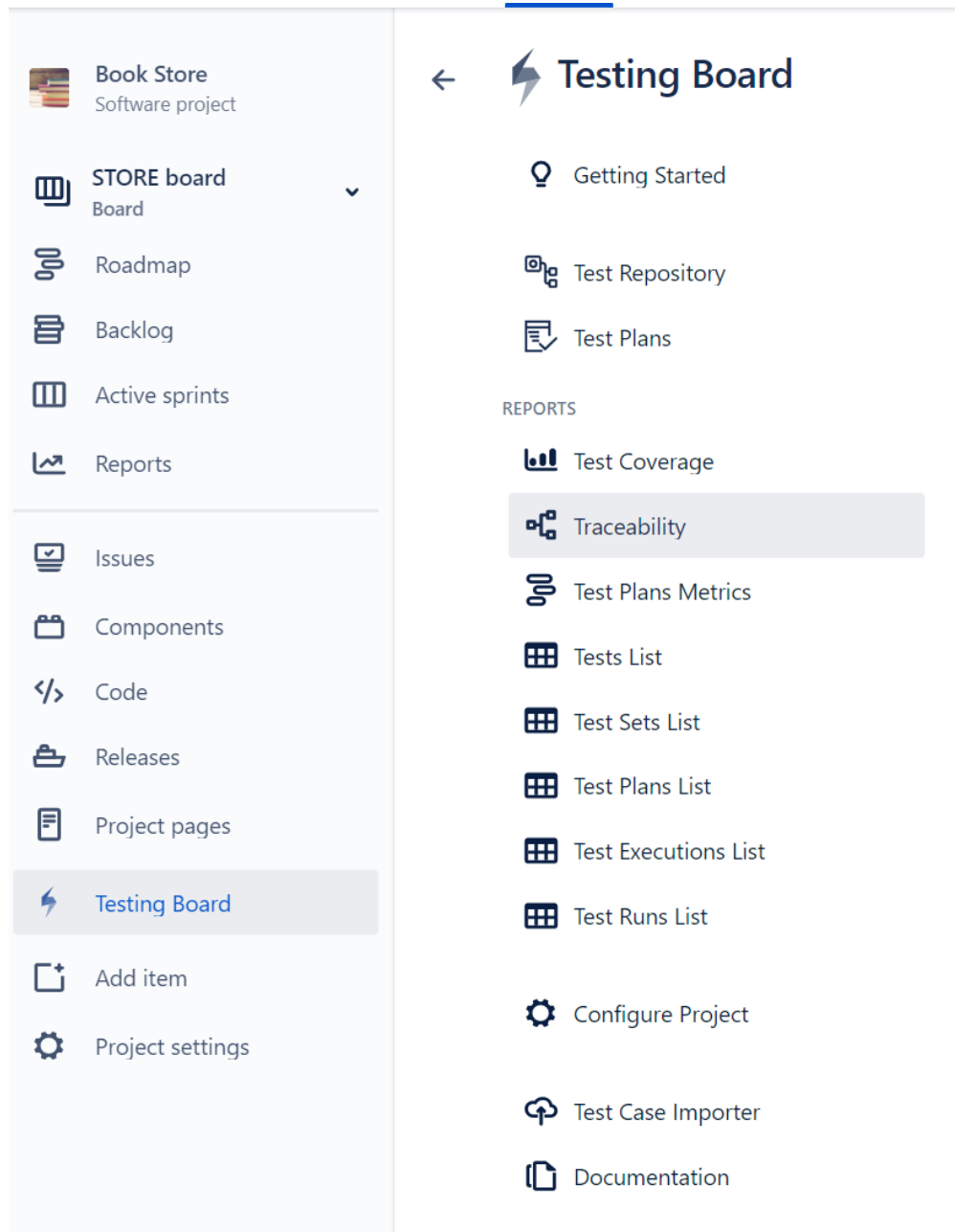**Latest**   Version   Test Plan

Test Environment

All Environments ⌄	OK

🟢 Final statuses have precedence over non-final.

Status ⇅	Key ⇅	Summary	Test Status ⇅
↑ .. TO DO	STORE-88	Test As a user, I want to have version control for docum...	🟩 PASSED

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

You can analyze the status of your project from two different perspectives:

- **Based on requirements:** you have reports such as **Test Coverage** or **Traceability Report** which provide insight into the status of requirements.
- **Based on Tests:** which look directly at related Test artifacts such as Tests, Test Sets, Test Plans and Test Executions. Xray also provides reports with metrics for these entities.

Learn More

This is just a start! There is so much more to learn and to explore about Xray.

You may want to learn more about:

- How to create automated & generic tests
- How to use preconditions
- How to work with Test environments
- Understand how coverage works

Take the onboarding Tester course for a deeper understanding.