

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 & Tests in the same Jira project	<ul style="list-style-type: none">✓ Info all together and visible to the whole team✓ Same context - testers & dev✓ Less administration effort✓ Simple to understand	<ul style="list-style-type: none">✗ Extra info that may be confusing to the team
Separated projects Separate Tests from Requirements and Defects	<ul style="list-style-type: none">✓ Dedicated project for Testers✓ Less information inside the project✓ Permissions can be more granular	<ul style="list-style-type: none">✗ Extra administration effort✗ May promote team divide

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.

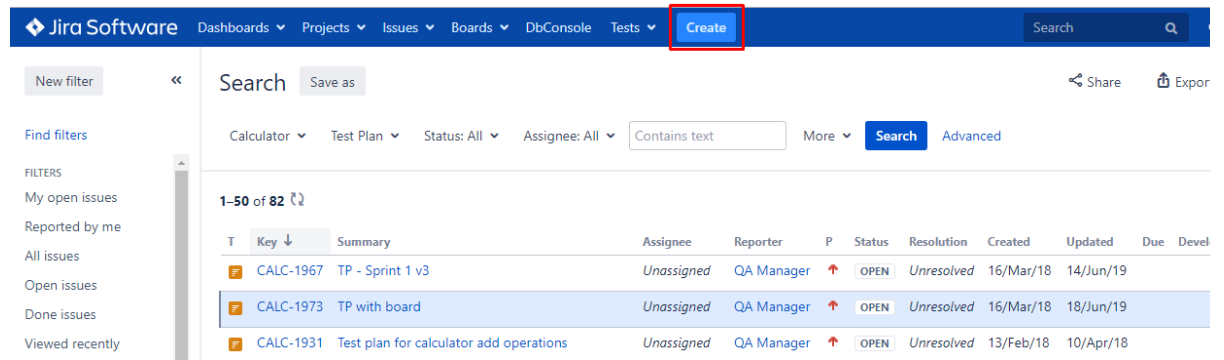
Check the next step to see how to Create a Test Plan.

4

Create Test Plan

Now that you have decided your test planning strategy you can create your first Test Plan.

1. Click "Create button" and Test Plan issue.



The screenshot shows the Jira Software interface. In the top navigation bar, the 'Create' button is highlighted with a red box. Below the navigation bar, the left sidebar shows a list of filters. The main content area is titled 'Search' and shows a table of search results for 'Test Plan' issues. The table has columns for 'T', 'Key', 'Summary', 'Assignee', 'Reporter', 'P', 'Status', 'Resolution', 'Created', 'Updated', 'Due', and 'Devel'. The results show three issues: 'CALC-1967 TP - Sprint 1 v3', 'CALC-1973 TP with board', and 'CALC-1931 Test plan for calculator add operations'. The 'CALC-1973' issue is highlighted in blue.


T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due	Devel
	CALC-1967	TP - Sprint 1 v3	Unassigned	QA Manager	↑	OPEN	Unresolved	16/Mar/18	14/Jun/19		
	CALC-1973	TP with board	Unassigned	QA Manager	↑	OPEN	Unresolved	16/Mar/18	18/Jun/19		
	CALC-1931	Test plan for calculator add operations	Unassigned	QA Manager	↑	OPEN	Unresolved	13/Feb/18	10/Apr/18		

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

Create Issue

[Configure](#)







Project*  Calculator (CALC) ▼

Issue Type*  Test Plan ▼ [?](#)

General Test Plan Details

Summary*

Description

Style▼ **B** *I* U A ▼  ▼  ▼  ▼    ▼ + ▼


Visual Text

Reporter*  QA Manager

Start typing to get a list of possible matches.

Assignee  Automatic ▼

[Assign to me](#)


Priority  Lowest ▼ [?](#)

Affects Version/s ▼

Start typing to get a list of possible matches or press down to select.

☐ Create another [Creat](#)

3. At Test Plan Details you can add Tests at "Tests associated with a Test Plan" or you can do it later at the add button.

 Bookstore / BOOK-30

Test Plan for v1.0

EditCommentAssignMoreTests PassTests failedAdmin

Details

Type:Test PlanPriority:TrivialAffects Version/s:NoneComponent/s:NoneLabels:default

Status:TESTING (View Workflow)Resolution:UnresolvedFix Version/s:1.0

Description

Click to add description

Tests

Test Plan Board

Overall Execution Status

15 PASS1 FAIL

Total Tests: 16

Explore possibilities to organize your Tests

- **Test Repository** - is 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** - is 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 select them when creating 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
Overall Requirement Coverage Report	<p>Provides the coverage status of requirements for some given context (i.e. Version/Test Plan).</p> <ul style="list-style-type: none">• Analysis can be done by "Version" or by "Test Plan" and on a given Test Environment• Takes into account results performed on that scope• Groups requirements by component, priority, etc
Traceability Report	<p>Shows the requirement traceability, from requirements to defects.</p> <p>This helps you analyze the requirements and related Tests, Test Runs and defects, so you can quickly identify uncovered or incomplete/faulty requirements.</p>
Test Plans Report	<p>Shows a list of Test Plans with consolidated information for each one, such as test statuses count, overall progress and Test Environments metrics.</p>
Test Executions Report	<p>Shows a list of Test Executions with some metrics related with each execution, such as the tests count per run status, per test type, overall progress and linked defects</p>
Historical Requirement Coverage	<p>Shows the evolution of the requirements coverage status for the given period.</p> <p>The number of requirements may be analyzed by percentage or absolute values.</p>



If you want to analyze the current status of your release, you might find it useful to check the Overall Requirements 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 Xray Reports and select the report you want to see.

Issues ▾Boards ▾Structure ▾Xporter ReportseasyBI

Tests ▾Create

Traceability Report [Switch report ▾](#)

Scope: Version; Version: None - latest execution; Environment: [Filter\(s\) ▾](#)

Quick Filters: OK (3)NOK (3)UNKNOWN (0)NC (1)

Requirement

(3) BOOK-351 **OPEN**

NOK

Version: -

New Transfer Domestic Transfer

BOOK-3

Test New T

Test on dat

PASS

SEARCH

Search Test

Search Pre-Condition

Search Test Set

Search Test Execution

Search Test Plan

Xray Reports

Test Repository

Test Plan Board

Automated Steps Library

Test Case Importer

Documentation

Get Started

Explore and learn more by taking the [QA Manager onboarding course](#).