# Working in regulated environments and ensuring compliance using Xray

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- Standards and regulatory requirements

# Overview

Organizations working in highly regulated markets (e.g., medical/health, pharmaceutical, security, automotive, aerospace, defense), usually have to comply with specific standards or some regulatory requirements that apply to them and the products they are responsible for.

As an example, ensuring safety is essential for organizations developing medical devices.

A strict control over the development process (testing included), release process, and its maintenance is required. Risk management is core to all activities.

In order to have a proper auditable process in place, that is compliant with high-demanding regulatory requirements, we need to:

- Ensure persistence of historical data & change tracking
- Ensue that historical data cannot be tampered
- Ensure that certain items can only be modified if people are allowed to do so
- · Ensure it's possible to identify who is responsible for what
- · Identify the relationship between entities
- Ensure testing has been performed and that acceptance criteria has been covered
- · Proof of the exact testing/checks that were performed
- Ensure diagnosis is facilitated and can be easily performed
- Ensure effective risk management is in place

# Ways to ensure regulatory and compliance needs

# Process

Overall, the process must be adjustable, controllable, documentable, clear, and tasks must be repeatable and auditable. Diagnosis should also be facilitated, to be able to understand events. On parallel, we must be able to properly manage risks.

Among others, we need to:

- implement a tailored, auditable, and controlled process (e.g., by configuring the project orgazation, by defining the semantics of entities, by enforcing rules & workflows for testing entities)
- support planning, including at testing level (i.e., using Test Plans)
- ensure tasks, including the ones derived from testing, are complete (i.e., by using tailored Xray issues)
- verify and analyze software requirements from multiple perspectives
- support unit, integration and system testing (i.e., by supporting diverse test automation frameworks alongside manual and exploratory testing)
- enable regression testing (i.e., by having tailored Test Sets or Test Plans for that)
- ensure software verification is complete (i.e., using coverage information)
- document released versions, including testing effort (i.e., by generating documents containing all the relevant data, including testing evidence)

facilitate software problem resolution processes (i.e., by using reports such as the Traceability one)

#### Implement your own-defined project organization, with fine control over project entities

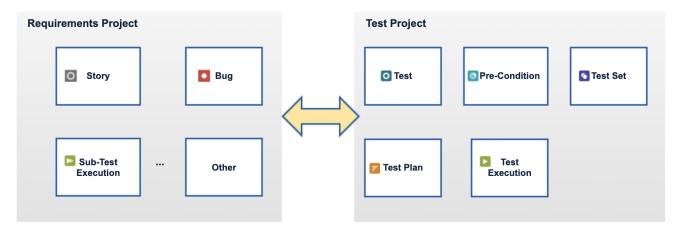
Xray supports different ways for organizing your project related items. This enables teams to adapt usage of the tool with the way they need or to the way they are organized functionally. But more than that: it enables teams to enforce or apply different rules to different entities.

The common scenario is to have an all-in-one approach where standard issue types (e.g. Story, Bug, Task) live alongside testing issue types (e.g. Test, Test Execution, Test Plan).

However, some teams prefer to have testing entities on a separate Jira project to have finer control over the process. Other teams prefer to have defects on a distinct project, or even on a remote Jira instance for security/business reasons.

All these possible project organization scenarios are possible and allow teams to apply more restricted rules on the related entities.

In the following scenario, two Jira projects are used: one mainly for the standard development/coding tasks and another one for testing purpose. This one of multiple configuration possibilities you can implement.



Even though you can be compliant with an all-in-one approach, Xray provides you the flexibility to even better suit your needs.

#### Learn more:

Project Organization Use Cases

# Implement fine Access control and Permissions

Organizations working in regulated environments need to be able to control the access and the permissions on project artefacts, including the ones derived from testing activities.

Access and permissions for Jira issue based entities (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution) are handled in the same way as for any other issue type in Jira.

It's also possible to restrict execution of Test Runs to its assignee, so that only the assignee can update its contents.

#### Learn more:

- Advantages of using Jira issues
- Configuration to restrict execution of tests to the Test Run's assignee

#### Use custom defects with their own semantics and decide where to store them

Semantically, and to make it clear and be able to apply different rules, it can make sense to have different issue types than the traditional "Bug."

In Xray, it's possible to define the issue types to be handled as "defects." Therefore, whenever reporting a bug, the team can use the Bug issue type or any other custom issue type where they need.

Defects can also be covered explicitly with tests (if configured as "requirements"/coverable issue types), for explicit verification of the underlying bug fixes.

# **Issue Type Mapping**

Requirements and Defects are two concepts commonly related to Tests. A Requirement represents a singular documented fault in a computer program or system that produces an incorrect or unexpected result, or causes it to behave in unintend and a Defect.

Available Issue Types	Requirement Issue Typ	Defect Issue Typ	bes
o Test	Fpic	8 Bug	8
Test Set	H New Feature	Incident	8
Test Execution	Story	Problem	8
Pre-Condition	Improvement	8	
F Test Plan	Incident	8	
Incident			
E Change			
🕒 Sub-task			
Technical task			

Defects can be reported on the same project alongside other project issues, or can be reported on a separate Jira project. Defects can also be reported on a separate but connected Jira instance, if you wish to do so.

#### Learn more:

- Issue Type Mapping
- Requirements and Defects

## Define what is a requirement and track them at multiple levels

Projects usually have multiple levels of requirements (e.g. Epic>Story). Some broad/complex needs may be addressed in smaller requirements. Value can therefore be decomposed in these different layers and it's important to track it and these layers.

In Xray, a "requirement" is any issue that can be covered with tests, no matter their type. The team can define which issue types can be handled as such, even their own custom issue types (e.g., "Feature").

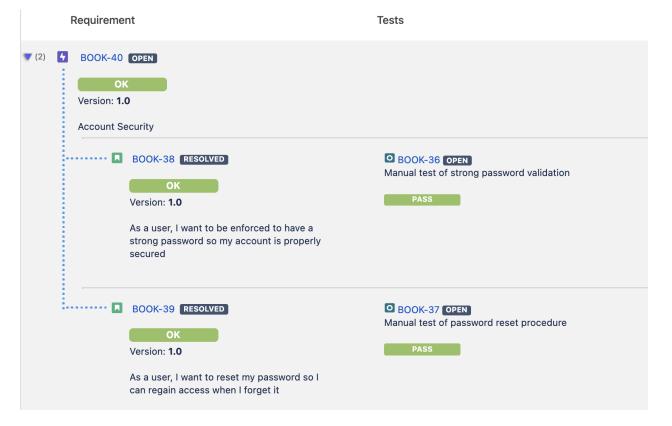
# **Issue Type Mapping**

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vailable Issue Types	Requirement Issue	Types
o Test	Fpic	8
Test Set	H New Feature	×
Test Execution	Story	×
Pre-Condition	Improvement	×
🗾 Test Plan		
Incident		

Xray provides multiple levels of requirements. It also provides different ways to define this hierarchical relationship (e.g., using issue links, or sub-tasks)

Epic and Story issues, usual in Agile environments, can be covered directly by testing. Coverage made on the Story issues can automatically be tracked on the related Epic.



- Issue Type Mapping
- Requirements and Defects

# Track the relevant requirements across multiple versions and/or environments

Requirements exist beyond the scope of a specific version. Besides, a specific requirement may be used in different contexts (e.g., browsers, mobile devices).

Therefore we need to be able to track the status of requirements throughout time/versions and also on the different scenarios where they will be used. This (coverage) status is based on the integrated testing results, include the ones from test automation.

We may want to perform this analysis at high-level (i.e., project), or for a/some specific requirement(s).

Xray allows you to answer questions such as:

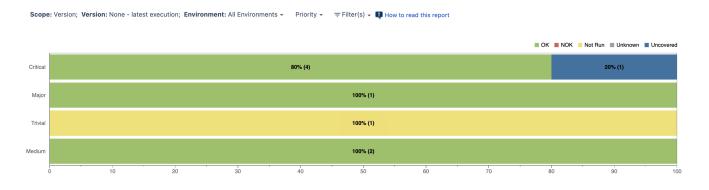
- · Are the requirements covered by any tests whatsoever?
- What were the requirements tested for these version? And what's their status based on the related testing? What's their completeness?
- How are the requirements implemented in an earlier version, on this new/other version?

The coverage status for requirements in Xray is multidimensional; in other words, we can analyze requirements from multiple perspectives: the latest testing results for version, or on a given environment, or just considering the results performed in the scope of a Test Plan.

Let's see some examples.

Accordingly with the latest reported results, all medium and major requirements are OK. However, we can see that one requirement is not covered. We can then drill-down if we wish, by clicking on the chart bar.

#### Overall Requirement Coverage Report Switch report -

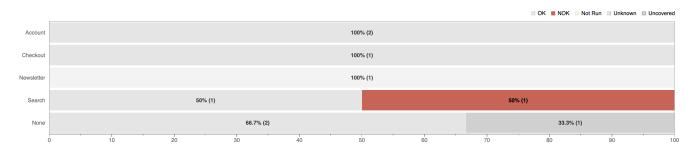


On version 1.0, 50% of the requirements related to the "Search" component are having problems. We can see that the epic BOOK-8 is 66,7% complete, because one of the related stories (BOOK-9) has 1 test currently failing on version 1.0.

Some related stories (BOOK-10, BOOK-11) are OK though.

#### Overall Requirement Coverage Report Switch report ~

#### Scope: Version; Version: 1.0; Environment: All Environments - Component/s - = Filter(s) - 💵 How to read this report



#### Requirements with Component/s "Search" and Status "NOK"

View Issues

Show	10	~	entries

					Search	
Кеу	🔷 Summary	♦ Total Tests	♦ Tests Passed	♦ Tests Failed	♦ Tests Unknown	Completeness
BOOK-8	As a visitor, I can manage my Shopping Basket	3	2	1	0	66.7%
BOOK-11	As a visitor, I can view all the books in my shopping basket	1	1	0	0	100%
BOOK-10	As a visitor, I can remove books from my shopping basket	1	1	0	0	100%
BOOK-9	As a visitor, I can add books to my shopping basket	1	0	1	0	0%

#### Learn more:

- Coverage Analysis
- Overall Requirement Coverage Report

# Implement Workflows on testing entities to have explicit control over the process

Teams can implement workflows on all Jira issue based entities (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution).

This will allow them to implement rigorous processes, including on testing entities, leveraged on the flexibility of Jira workflows.

Additionally, Xray provides the ability to further restrict usage of some these entities.

#### Possible use cases:

- have workflow status to review test specifications
- implement an approval mechanism, having one or more approvers
- make items "read-only" when transitioned to a certain workflow status by setting a Jira property ("jira issue editable")
- restrict usage of Tests in a certain workflow status (see how)
- disallow executions for Test Executions in a specific status (see how)
- reopen/review Tests upon changes on related requirements (example)
- enforce that requirements cannot transition to a given status, unless they are covered or even that those tests are successful (example)

#### Learn more in:

• Using Jira workflows for testing purpose

# Sign using e-signatures to track explicit reviewal/approval and ensure data integrity

Electronic/digital signatures are one of the common mechanisms employed to ensure that document, for example, has been reviewed by one or more people and that no changes happened on the signed document meanwhile.

Xray issue based entities (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution) can all be digitally signed, using one of many available Jira apps for that purpose. This is something unique, as it provides full control over the core testing activities; not only Tests can be digitally signed, also Test Sets, or even Test Plans.

• available Jira apps for e-signatures

# Facilitate reviewing, also during test execution

Review during or after test execution can be implemented.

In Xray, similarly to other issues, Test Execution issues have an assignee. We can use that as the main responsible for the Test Execution, perhaps for defining the list of tests to be run and then for reviewing its results.

The Tests to be run on Test Executions (i.e., the Test Runs) can have their own specific assignee. Therefore, we can have a Test Execution responsible and the individual testers performing the identified testing.

This Test Execution as a whole is assigned to Petr Gonzalez but one of the Test Runs is assigned to another user (Bruno Conde). This can be used as means to have one person responsible for the Test Execution and reviewing the related reported results, while at the same time allowing for someone else to perform the actual testing.

Bookstore / BO Test Exect	oK-31 Ition for Test Plan BOOK-30						
Sedit Q Commer	Assign More <b>v</b> Start Progress Resolve Issue Close	Issue Admin Y					
✓ Details						<ul> <li>Xporter</li> </ul>	
Type:	Test Execution	Status:	REOPENED (View Workflow)			Template	Basic Release Notes
Priority:		Resolution:	Unresolved				
Affects Version/s:	None	Fix Version/s:	1.0			Output format	DOCX
Component/s:	None default						🛃 Export
Labels: Test Plan:	BOOK-30						Export
Test Environments:	None						
Revision:	65d64uyg7t6r					✓ People	-
Novision.	oodo-tayg/toi					Assignee:	O Petr Gonzalez
<ul> <li>Description</li> </ul>							Assign to me
Click to add description	n					Reporter:	💽 Xpand IT Admin
						Votes:	0
✓ Tests						Watchers:	1 Stop watching this issue
Add Tests 🗸						✓ Dates	
						Created:	25/Feb/19 2:06 PM
Overall Execution Status						Updated:	Just now
						Begin Date:	18/Feb/19 2:03 PM
14 pass 1 fa	IL <b>1</b> торо					End Date:	22/Feb/19 2:03 PM
Total Tests: 16						✓ Agile	
∓ Filter(s)						Active Sprint: View on Board	Sprint 1 ends 18/Mar/19
Apply Rani	2			Show 100 🗸 entries	Columns 🗸		
🔻 Rank	🔷 Key 🛭 🍦 Summary	Test Type #Req	#Def Assignee	Status			
□ 16	BOOK-36 Manual test of strong password validation	Manual 2	0 Bruno Conde	ТОДО	•		
□ 15	BOOK-37 Manual test of password reset procedure	Manual 2	0 Petr Gonzalez	PASS	• …		

This enables the implementation of a reviewal process, where Test Execution related results can be reviewed after they're reported; the Test Execution can be transitioned to a status (e.g., "PENDING\_REVIEW") and then transitioned to another one (i.e., "CLOSED") when it's reviewed.

We can also create some specific Test Run custom field (e.g., "Reviewer Comment") and make it required for all runs, or just for the ones related to manual scripted test cases.

Project settings								
Summary	Test R	Edit Test Ru	n Field					
Details	Define To							
Audit log	Denne n							
Re-index project		N	ame* Reviewer Comm	ent			Test Types	
Delete project		Descrip	tion Comment of the	reviewer	]		GENERIC CUCUMBER MAN	IUAL
Issue types		Т	ype Text Field (multi-	line) 🗸 🗸				
Bug		Test Ty		Generic ×				
- Epic			Manual ×					
Pre-Condition		Requ	ired 🛛 🗹 This test run fi	eld is required				
- Story								
- Sub-bug					Update	Cancel		
- Sub-task								
- Sub Test Execution								
- Task								
<ul> <li>Test</li> <li>Test Execution</li> </ul>								
<ul> <li>rest Execution</li> <li>2 more issue types</li> </ul>								
Bookstore / Sub Test Execution: BOOK-333 / Tes Test visitors can add books to their : Execution Status FAIL	shopping bask	et				Import Executi	Assignee: None Executed By: Xpand IT Admi	Return to Test Execution Versions: 3.0 n Revision: -
Started On: 24/Aug/21 6:09 AM 🛱	Finished On: 25/Aug	/21 2:38 PM					Tests - environments:	
Comment	Previ	ew Comment 🗸	Execution Defects (0) C	reate Defect Create Sub-Tas	k Add Defects 🗸	Execution Evider	nce (0)	Add Evidence 🗸
Execution Details								
Test Description								~
Test Issue Links (3)								~
Custom Fields								~
Reviewer Comment								
Stylev B I <u>U</u> <u>A</u> × Å × ∂ <sup>2</sup> × <u>U</u> ×	≔ ⊯ ⊚× +×	* *						
)'ve marked this as a failure instead								
Visual Text								
Test Details		~ ×						^

During execution of a test and its revision, we may find it useful to report a step as having an acceptable failure (e.g., "IRRELEVANT\_FAIL"). We can then decide to mark the overall Test Run with a status (e.g., "FAIL\_DISCARD") that won't mark the related requirement as being NOK, such as UNKNOWN or even OK if we want.

#### **Test Statuses**

Manage custom Test Run statuses for Xray

Name	Description	Final	Color	Requirement Status
PASS	The test run has passed			ок
TODO	The test run has not started			NOTRUN
EXECUTING	The test run is currently being executed			NOTRUN
FAIL	The test run has failed	1		NOK
ABORTED	The test run was aborted	1		NOTRUN
BLOCKED				NOTRUN
PENDING				UNKNOWN
FAIL_DISCARD	There was a minor issue but nothing relevant			UNKNOWN
TAL_DISCARD	mere was a minor issue put notining relevant			ONKNOWN

#### Test Step Statuses

Manage custom Test Step statuses for Xray

Name	Description	Color	Test Status
PASS	The test step has passed		PASS
TODO	The test step has not started		TODO
EXECUTING	The test step is currently being executed		EXECUTING
FAIL	The test step has failed		FAIL
SKIP	The test step has been skipped.		PASS
IRRELEVANT_FAIL	There was a minor issue with this step but nothing relevant		FAIL_DISCARD

Bookstore / Test Plan: BOOK-30 / Test Execution: BOOK-31 / Test: BOOK-36 Manual test of strong password validation

Execution S	Status 📕 FAIL_DISCARD 🗾 🚺						Bruno Conde Xpand IT Admin -	Versions: <b>1.0</b> Revision: <b>65d64uyg7</b>	t6r
Com	iment	Preview Comment 🗸	Execution Defects (0)	Create Defect Create Sub-Task	Add Defects 🗸	Execution Evidence (0)		Add Evidence	~
<b>E</b> x	ecution Details								
Test Des	scription								~
Test Issu	ue Links (1)								^
tests	BOOK-38 As a use	r, I want to be enforced to have a strong password	so my account is properly secure	d				RESOLVED	
Custom	Fields								~
Test St	eps (4)								^
1	Action		Data			Expected Result			
	Open the Change Password screer	n by selecting option "My Profile > Password"	None			None			
	Actual Result ¥	Comment 🔲 🕀 Defects	① (0) 🕀 E	vidence 💿 (0) 🔶			Step State PASS	₽	
2	Action		Data			Expected Result			
	Fill the password fields with data		Current Password: passw0r New Password: p4ssw0rd Confirm New Password: p4			Error: "Current password is incorrect"			
	Actual Result ¥	Comment 🔲 🕀 Defects	⊙ (0) ⊕ E	ividence 👁 (0) 🔶			Step State IRRELEVA	NT_FAIL	

# Use detailed, trackable and yet flexible Test Planning

Even though plans can change (especially in an Agile context), being able to define a plan, no matter its level of detail, is something usually required.

Some testing activities, including verification, can be planned upfront.

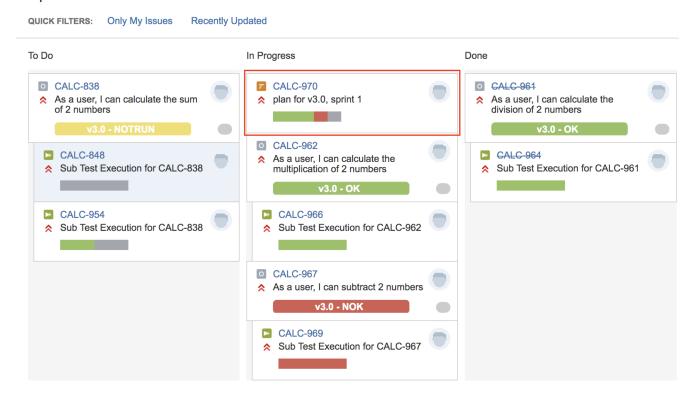
Xray provides an entity specifically for this purpose: the Test Plan. The Test Plan can be used more strategically, to define and track and assign testing activities to be performed.

In Xray, teams can have one or more Test Plans to track different testing efforts, for example related with different types of tests, or different risks, or even explicitly for regression testing.

The Test Plan can be as detailed as needed and documents can be added and linked to it. A Test Plan is also assigned to a user; it can be prioritized, labelled, and be explicitly one work item of the Sprint or of the Kanban board.

In the following example, we can see the Test Plan being tracked as an item and handled as part of the Sprint, similarly to other on-going project issues.

# Sprint 1



#### Learn more:

- Planning Tests
- Tips for planning tests
- Some examples of using Test Plans in Scrum context
- Agile Board Enhancements

### Track testing tasks with full Assignment and Accountability

Xray issues (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution) can be assigned and watchers can be added to them.

That means, for example, that whenever a Test is modified, you can get notified.

Bookstore / BOC Test visitor		from their shopping basket				
Q Comment	Assign More 🗸 Start Pr	Progress Resolve Issue Workflow •	Admin 🖌			
ails					<ul> <li>Xporter</li> </ul>	
	O Test	Status		ew Workflow)	Template	Basic Release
ority: ects Version/s:	O Trivial None	Resolu Fix Ver		d	Output format	DOCX
mponent/s: bels:	None default					🕁 Export
	Shopping Basket					
					✓ People	
escription					Assignee:	🐢 Bruno Con
ck to add descriptior	1					Assign to me
st Details					Reporter:	Petr Gonz
	Cucumber				Votes:	0 Vote for th
pc.	oucumen				Watchers:	1 Stop wate
enario Type:	Scenario					
	Given I am on shopping bask	sket page rom basket button for a listed boo	k		✓ Dates Created:	25/Feb/19 1:3

Ensure issues get done by assigning them to users and tracking them using workflows (more info ahead), no matter if you're dealing with the specification of a test case or the execution of a bunch of tests within a given Test Execution.

Individual Test Runs can also be assigned and it's possible to notify the assignee using traditional email notifications, just like any other issue in Jira.

#### Learn more:

Email Notifications

### Enable Customization to fine-tune the tool to your overall rigorous process

For defining a more rigorous process, teams need the ability to customize usage of the tool.

This includes, among others, the ability to:

- add custom fields on any testing entity, including all Jira issue based entities (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution) and also on Test steps and on Test Runs
- implement additional customizations (e.g., using ScriptRunner, Automation for Jira, Cprime Power Apps)
- · integrate with other Jira apps to widen the feature set provided by Xray itself

#### Learn more:

- · Advantages of using Jira issues
- Integration with ScriptRunner
- Integration with Automation for Jira
- Integration with Cprime Power Scripts, Power Custom Fields, and Power Actions

# Data

# Record all meaningful testing evidence

Teams can follow different approaches/styles for testing: scripted (i.e. test cases and "automated" test scripts) and exploratory.

No matter the testing approach, Xray can provide visibility of testing results, including evidence, in one place: Jira.

Xray allows you to identify:

- · version and revision of the SUT
- environment (e.g., browser, device)
- test result/status
- detailed results (e.g. steps)
- screenshots, videos or any other file-based evidence
- execution logs
- any reported comments

Whenever manually executing scripted test cases, we can report results at the step level, and attach some screenshot as evidence, for example:

Atlas Mobile App / Test Plan: ATLAS-17 / Test Execution: ATLAS-19 / Test: ATLAS-8 Manual test of strong password validation		Dataset      Return to Test Execution      Previous Next		
Test Details MANUAL				
> Custom Fields				
> Test Description				
∧ Test Steps				
1 Action	Data	Expected Result		
Open the Change Password screen by selecting option "My Profile > Password"	None	None		
Actual Result > Comment  Comme	(0) ⊕ Evidence ♥ (0) ⊕	Step State PASS		
2 Action	Data	Expected Result		
Fill the password fields with data	Current Password: passw0rd New Password: p4ssw0rd Confirm New Password: p4ssw0rd	Error: "Current password is incorrect"		
Actual Result > Comment 🗖 🕞 Defects 🕚	(0) ⊕ Evidence ♥ (0) ⊕	Step State PASS		
3 Action	Data	Expected Result		
Close error message and fill again the password fields with data	Current Password: P4ssw0rd New Password: password Confirm New Password: password	Error: "New password is too simple"		
Actual Result ¥ Comment 🗖 🔶 Defects 🔿	(0) ⊕ Evidence ♥ (0) ⊕	Step State PASS		
4 Action	Data	Expected Result		
Close error message and fill again the password fields with data	Current Password: P4ssw0rd New Password: P4ssw0rd Confirm New Password: P4ssw0rd	Information message: "Password successfully changed"		
Actual Result ¥ Comment Q Defects	(1)      Evidence      (1)	Step State FAIL +		
	Screenshot_1626039796			
> Activity				

Detailed information from multiple test automation frameworks can also be imported to Xray, and tracked similarly to other tests.

This includes automation frameworks such as Robot Framework, where you can see the detailed keyword-level information.

1	Robot / Test Plan: ROB-12 / Test Execution: ROB-17 / Test: ROB-18 Valid Login		Export Test as Text	Return to Test Execution Next >
	Execution Status PASS		Assignee: / Executed By: A Tests - environments:	
년 상	Comment Preview Comment   v	Execution Defects (0) Create Defect   Create Sub-Task   Add Defects   v	Execution Evidence (0)	Add Evidence 🗸 🗸
4	Execution Details			
0 <sub>10</sub>	Test Description			~
C (1)	Test Issue Links (1)			^
$\bigcirc$	tests ROB-11 As a user, I can login the web application			IN PROGRESS
	Test Details			^
	Test Type: Generic Definition: Login Tests.Valid Login.Valid Login			
	Results			^
	Context	Output	Dura	tion Status
	Open Browser To Login Page	-	3	sec PASS
	Input Username	-	24.000	
	Input Password	-	22.000	
Ö	Submit Credentials Welcome Page Should Be Open	-	46.000	
>>	welcome Page Should be Open	-	7.000	ms PASS

If adopting BDD frameworks, such as Cucumber, we can also see detailed information about the Gherkin statements and deep-dive into the automation logs or evidence (e.g., screenshots) taken by the automation.

	/ Test Execution: CALC-7938 / Test: CALC-7936 nteger multiplication	ą	Import Execution Results	Export to Cucumber	A Return to Test Execution	
Result	S					
	Context			D	Duration Status	
	·			2.:	.167 ms FAIL	
	Steps					
	Given I have entered 3 into the calculator			0.0	092 ms PASS	
	And I have entered 0 into the calculator			0.7	706 ms PASS	
	When I press multiply			0.0	047 ms PASS	
	Then the result should be 0 on the screen			1.3	322 ms FAIL	
	<pre>java.lang.AssertionError: expected:<d> but was:<d>     at org.junit.Assert.fail(Assert.java:89)     at org.junit.Assert.fail(NotEquals(Assert.java:835)     at org.junit.Assert.assertEquals(Assert.java:120)     at org.junit.Assert.assertEquals(Assert.java:146)     at calculator.StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_stepDefinitions.the_result_should_be_on_the_screen(StepDefinitions.the_result_stepDefinition</d></d></pre>	efinitions.java:36) hber-java-calc/featur	es/2_CALC-7935.featu	re:11)		
Test Details					~	
Test Type: Scenario Type: Scenario:	Cucumber Scenario Swen I Siven I have 42 cukes in my belly 2 when I wait 1 hour 3 Then my belly should growl]					
Results					~	
Cont	avt		Duration	Status		
			286 millisec	PASS		
	Hooks					
	Before Cukes.setUp()	• (2)	0 millisec	PASS		
	After Cukes.tearDown()	_		PASS		
	Background	evidence_step_30				
	Given buy a few cukes	evidence_step_30	_	PASS		
	Steps	evidence_step_30		D1 65		
	Given I have 42 cukes in my belly	weidence_step_30		PASS		
	When I wait 1 hour	<pre>widence_step_30</pre>	_4.xml	PASS		
	Then my bely should grow!			PASS		

Xray also supports exploratory testing using a desktop app (Xray Exploratory App) that can integrate with Xray to bring the best of both worlds: have exploratory testing evidence tracked in Jira, be accessible by the team, and reflect on the related requirements.

Hello XET App / Test Execution: HX-194 / Test: H my test to edit	HX-189		Execute with Exploratory A		ecution Results	
				↑ Return	to Test Execution	Next >
Execution Status FAILED				Assigne	e:	Versions: -
Started On: 4/Dec/2019 04:30 PM				Unassi	gned	Revision: -
Finished On: 4/Dec/2019 06:43 PM				Execute Nelson		
				Test En	vironments: -	
Comment	•	Execution Defects (1)	<b>•</b> ^	Execution Evidence (2)		0 ^
Session Started • 18h36   04-12-2019		HX-204 my defect documented		🗅 xrayVideo_2019	266.7 kB 4/Dec/2019	9 06:41 PM
Duration 00:01:02 00:00:52 • Note [Idea] A great note about this				Test Session-D	2.1 MB 4/Dec/2019	06:43 PM
Execution Details						

- Execute Tests
- Vast collection of test automation tutorials showcasing integrations with Xray
  Performing exploratory testing and integrating it with Xray

# Ensure data persistence, history and change tracking

In order to enable auditing and facilitate diagnosis, data must be stored, and changes, whenever applicable, need to be clearly identified.

In Xray, all data is persisted and can be easily tracked using a historical timeline.

All changes on Jira issue based entities (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution) are tracked similarly to other issue types in Jira.

# One of those examples include Tests themselves.

<ul> <li>Activity</li> </ul>			
All Comments W	Vork Log History Activity		î
O Administrator crea	ted issue - 24/Jun/19 10:20 AM		
O Administrator made	e changes - 24/Jun/19 10:20 AM		
Field		Original Value	New Value
Component/s			Account [ 10900 ]
O Administrator made	e changes - 24/Jun/19 10:21 AM		
Priority	Trivial [ 5 ]		Major [ 3 ]
O Administrator made	e changes - 24/Jun/19 10:21 AM		
Manual Test Steps			[Step: Step] [Data: Data] [Expected Result: Expected Result]
O Administrator made	e changes - 24/Jun/19 10:21 AM		
Manual Test Steps			[Step: Open the Change Password screen by selecting option "My Profile > Password"] [Data: ] [Expected Result: ]

Test Runs also have an activity section where its changes are tracked.

	Comment 🔲 🕂	Defects 🕕 (0) 🕂	Evidence 🛛 (0) 🕂	Step State 📕 P	ASS ←
Action		Data		Expected Result	
Close error message and fill ag	ain the password fields with data	Current Password: P New Password: P4se Confirm New Passwo	sw0rd	Information message: "Password successfully changed"	
Actual Result ¥	Comment 🔲 🕀	Defects () (0) 🕀	Evidence 🞯 (0) 🕂	Step State	ASS ←
Just now					
Just now					
	to PASS				
Changed field "Status" from TODO Just now					
	0 to PASS				

Test Runs

### Ensure no data tampering

Historical results (i.e. Test Run details) can't be modified. The same applies to past changes made on Jira issue based entities (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution).

It is also possible to make Xray issue-based entities read-only. Besides, test specification cannot be modified during execution of the related test.

# Export data in human-readible formats and automate data snapshots

All core entities, including Test Runs (i.e. results), can be exported to PDF, Word, or Excel documents, using fully customizable documents in terms of layout.

This is a way to obtain a formal, readable, copy of the relevant test data, no matter if it's related to test specification or execution.

Two options exist to achieve this: either using the built-in Document Generator capabilities, or by using the more complete and general purpose Xporter App.

You can start by defining a template, or downloading and customizing an existing one from the template store, with all the data to be embedded, logos and other information (e.g., legal disclaimers)

							Test R	eport					
	This te	mplate	creates a t	est report from t	he sel	ection	ofmultipl	e issues, ci	reated using >	Kray for JII	RA.		
						D	ownload T	emplate 🖬					
						Do	wnload Sa	imple File	*				
				,					,				,
2. Manual Te	sts			5	3. Auto	mated Test	5		5	3.1.	7. Test	Plans	4
	Test EX-62 - Po							anto de colmaias em	ambiantes acrestes	Key		Summary	
	Test EX-62 - Po	wer it On M			<ol> <li>Automated Test EX-58 - Funcionamento de colmeias em ambientes agrestes</li> <li>3.1.1. Status of the Last Execution</li> </ol>				EX-8	8	Test Plan to validate Templates - EK-62 and EK-58		
v2.0 - FAIL	the Last Execution				v.a Decume								
2.1.2. Pre Cond	litions				3.1.2. Pre Conditions								
None 2.1.3. Requiren					Key	Summary		Condition Given The Dark side of t	he force is a pathway to				
Requirement Key		mmary			EX-67	Are you Liste	ning?	many abilities, some con Ask Is it possible to lean	isidered to be unnatural				
EK-68	You talking to me	0						Expect Not from a Jedi					
2.1.4. Descript	ion					equirements							
does it work? <b>yes</b> , it seems to					Requireme		lequirement Summary						
					EX-70 EX-68		hone home 'ou talking to me?						
2.1.5. Test Prov			Expected Result		3.1.4. D		ou taking to mer						
Step Number	Step Frankly, my deat, I don't give a	Data	Expected Result				as instalações até à <del>exa</del> c	istão					
	Cars.					est Procedure							
2	l'm gonna make	1972	THE GODFATHER		Scenario Given abel	lhas							
	him an offer he can't refuse.					produce hone	ny .						
2.1.6. Test Sets			1		Then colm I want to	reias							
Key 5	ummary			ist Count	Given								
	porter Performance All 1		5		3.1.6. Te								
	(porter Performance Man	ual Tests	2		Key EX-63	Summar	y Performance All Tests		Test Count				
2.1.7. Test Plan Key 5	iummary.				EX-63 EX-56		Performance Automated Tes	its	3				
	lest Plan to validate Tem	plates – EX-62 ar	nd EX-58			1			1				
TEST REPORT - AUTO	MATICALLY GENERATED			4	TEST REPOR	T - AUTONATICAL	LY GENERATED		5	TEST	REFORT - J	NITOMATICALLY GENERATED	6

# Test Plan Advanced with Cover Page (Xray 5)

This template provides a way to see a Test Plan with a little more detail. You can see the Test Run details, Test Steps details, attachments, evidences, and defects of normal and parameterized tests. This template is compatible with versions above 5.x.x



With Xporter and DocGen it's possible to export the information of an issue (e.g., a Test Plan), right from the issue screen (among other places).

📲 Jir	Dashboards 👻 Projects 👻 Issues 👻 Boards 👻 Structure 👻 Xporter Reports	Jone Conta		Q Search	土 🧉 🛛 🗘 🌑
<b>7</b>	Bookstore / BOOK-30 Test Plan for v1.0 / Edit O Comment Assign More ~ Tests Pass Tests failed Admin ~	Xray - Document Generator		e e	∲ Doc. Generator
8		Template Ø	- Marantan		
	V Details  Type: Test Plan	Test Plan Advanced with Cover Page (Xray 5)	✓ Xporter		
۵	Priority: O Trivial	Output Format	Template	Basic Release Notes	▼ ⑦
<u>[~"</u>	Affects Version/s: None	DOCX V	Output format	DOCX	~
	Component/s: None Labels: default			🛃 Export	
\$? ∭	> Description	Export Close	v People		
4	✓ Tests		Assignee:	Bruno Conde	
		+ Create Test Execution > + Add	Reporter:	Assign to me Xpand IT Admin	
	- Tear Plan Dual u	+ Cleare Test Execution - + Aut	Votes:	0	
	Overall Execution Status		Watchers:	1 Stop watching this issue	
	18 pass 2 fail		Dates Created:	25/Feb/19 2:04 PM	
			Updated:	03/Dec/19 10:50 AM	
	Total Tests: 20		Begin Date:	18/Feb/19 2:03 PM	
			End Date:	22/Feb/19 2:03 PM	
	₩ Filter(s)		✓ Agile		
	<b>■</b> *	Show 10 v)entries All Environments - Columns	Active Sprint:     View on Board	Sprint 1 ends 18/Mar/19	
	Key Summary Requir	ements #Test Executions Issue Assignee Latest Status			
	BOOK-18 Test a visitor can change his locale BOOK	5 1 Bruno Conde PASS			
	BOOK-17 Test a logged in visitor can edit the default address BOOK-	-1, BOOK-4 1 Bruno Conde PASS			

With Xporter it's also possible to export issues in bulk; this can be useful to export a set of Tests or Test Executions, for example.

Bulk Operation							
Choose Issues Selected 3 issues from 1 project(s)	Step 2 of 4: Choose Operation Choose the operation you wish to perform						
Choose Operation	O Edit Issues	Edit field values of issues					
<ul><li>Operation Details</li><li>Confirmation</li></ul>	O Move Issues	Move issues to new projects and issue types					
ooninnaaon	Transition Issues	Transition issues through workflow					
	O Delete Issues	Permanently delete issues from Jira					
	O Watch Issues	Watch all the selected issues. You will receive notifications when any of these issues are updated.					
	O Stop Watching Issues	Stop watching all the selected issues. You will no longer receive notifications when any of these issues are updated.					
	<ul> <li>Export Issues (Xporter)</li> </ul>	Export issues using Xporter					

With any of the two solutions, and just for reference, it's possible to:

- generate a custom PDF document with test cases and their specification, and the link to the related requirements (e.g., the typical "notebook of tests)
- generate a custom Word document with the current detailed results of a Test Plan, and all related iterations (i.e. Test Executions)

With Xporter it's possible to automate the generation of these documents and, for example, generate them upon a transition of a workflow, or attach to an existing Confluence page, or even send them to some email.

#### Administration & Search JIRA admin

Applications Projects Issues Add-ons User management System

Add Post Function To Transition

	Name	Description							
	Assign to Current User	Assigns the issue to the current user if the current user has the 'Assignable User' permission.							
	Assign to Lead Developer	Assigns the issue to the project/component lead developer							
	Assign to Reporter	Assigns the issue to the reporter							
$\bigcirc$	Create Perforce Job Function	Creates a Perforce Job (if required) after completing the workflow transition.							
$\bigcirc$	Fire Event	Fires an event that can be processed by listeners.							
$\bigcirc$	Generate Change History	Updates change history for an issue and stores the issue to the database.							
$\bigcirc$	Notify HipChat	Send a notification to one or more HipChat rooms.							
0	Trigger a Webhook	If this post-function is executed, JIRA will post the issue content in JSON format to the URL specified.							
0	Update Issue Field	Updates a simple issue field to a given value.							
$\bigcirc$	Update Issue Status	Sets issue status to the linked status of the destination workflow step.							
	Xporter for JIRA Create Document Post Function	Create a document based on the issue fields.							
0	Xporter for JIRA Send Report Post Function	Send a report by email.							

Add Cancel

#### Learn more:

- Built-in Document Generator
- Xporter app Xporter Template Store

# Risks

# Handle risks with proper Risk Management and Risk-Based Testing

Handling risks is an intrinsic part of good testing and is essential to organizations that work in highly regulated environments.

Xray supports Risk-Based Testing (RBT) and allows you to define risks at different levels: project, requirement or at the test-level.

Depending on the exact need, implementation of risk management can be accomplished using Jira built-in capabilities or through an additional app.

No matter the approach, we can use risks to pick the requirements and/or the Tests that we need based on risk criteria.

Select Search JQL								
Filter(s) -							Col	umns <del>-</del>
Project Calculator (CALC) ×		♦ Issue Type	∲ Key	Summary	♦ Risk Level	♦ Probability	♦ Impact	Risk V Score
Test Type		0	CALC-3703	ability to perform clear / start new operations from scratch	L5: Severe	4	4	((( 16 )))
Choose the Test Type		0	CALC-1202	CanAddNumbers	L3: High	2	4	(( 8 ))
Contains text		0	CALC-1203	CanDoStuff	L2: Medium	1	4	(4)
		0	CALC-3706	check the history of operations	L1: Low	1	2	(2)
Risk Score	Showin	ng 1 to 4 of 4	l entries			First Pre	vious 1	Next La
etween 2								

Whenever risks are defined at requirement level, we can analyze coverage for all requirements on our project and, for example, decide to make a release or not based on the status of the most critical requirements.

# Overall Requirement Coverage Report switch report -



#### Learn more:

- Performing Risk-Based Testing (RBT) with Xray
- Risk Management
- Risk-Based Testing

# Mitigate risks by fostering clarity and facilitating collaboration, including on all testing activities

The best way to avoid misunderstandings is to clarify them ASAP and make sure doubts don't get lost. This is, in itself, a way of risk mitigation.

Comments and evidence (e.g., reference documentation) can be added on all Xray issue based entities (i.e. Test, Pre-Condition, Test Set, Test Plan, Test Execution, Sub-Test Execution) and also on Test Runs.

✓ Details					✓ Xporter	
Type:	Test	Status:	OPEN (View Workflow)		Template	Basic Release Notes
Priority:	O Trivial	Resolution:	Unresolved		0.1.1.1	
Affects Version/s: Component/s:	None None	Fix Version/s:	1.0		Output format	DOCX
Labels:	default					🛓 Export
Test Repository Path:	Shopping Basket					
					✓ People	
> Description					Assignee:	Bruno Conde Assign to me
<ul> <li>Test Details</li> </ul>					Reporter:	Xpand IT Admin
Type:	Cucumber				Votes:	
Scenario Type:	Scenario				Watchers:	<ol> <li>Stop watching this issue</li> </ol>
	Given I am on a product detail page				tratoriol di	Cop Matering this issue
Scenario:	When I select the size/color/amount				✓ Dates	
	And I click the add to basket button Then the product is added to my shopping basket				Created:	25/Feb/19 1:39 PM
	Then the product is added to my shopping basket				Updated:	Just now
				🗾 Edit Steps		
					✓ Agile	
> Pre-Conditions					View on Board	
> Test Sets						
> Test Plans						
> Test Runs						
> Attachments						
Issue Links				+		
> Structure				0		
<ul> <li>Activity</li> </ul>						
	Work Log History Activity					
All Comments	WORKEDY MELIVILY					
✓ ○ Xpand IT Adm	in added a comment - Just now			e 🖋 🖷		
Bruno Conde are	there any security risks we should consider in this flow?					

If your team decides you need one or more specific fields to embed some relevant information, then you can create custom fields on all of the previous entities, including on Test Steps and also on Test Runs, if you wish to do so.

C	Bookstore / BO		add books	to their she	opping bas	sket									
	Edit Q Commer	it As	sign More 🗸	Start Progress	Resolve Issue	Workflow 🗸	Admin 🗸								
	Details Type: Priority: Affects Version/s: Component/s: Labels: Test Repository Path:	<ul> <li>Test</li> <li>Trivi</li> <li>None</li> <li>None</li> <li>defaul</li> <li>Shoppi</li> </ul>	al			Status: Resolu Fix Ver	tion:	OPEN Unresc 1.0	(View Workflow) Ived						
>	Description														
	<b>Test Details</b> Type: Scenario Type: Scenario:	When ] And I	io I am on a prod Select the si click the add	duct detail pa ize/color/amou to basket but added to my s	nt ton	t -	Add Field	Name*	Probability∫ <b>Probability</b> (Create	new field)	• field Cance	l S teps			
il 🚏	ira Dashboards 🗸 🛛	Projects 🗸	Issues 🛩 Boards	✓ Structure ✓ Xp	oorter Reports eaz	:yBl Tests 🗸 🔽	reate						Q Search	) <b>1</b> . 4 <sup>€</sup>	0 C 🔘
8	Project setting	S				Create Test Du	n Field			_					
						Create Test Ru	n Field			- 1					
8 0) 4	Summary Details Audit log Re-index project		Test Run Cust Define Test Run "Ci Name	ustom fields" at proje	ct level Description	Name Description	hw temperatur	e		-		Flags		Actions	Create
2	Delete project					Туре	Number Field		~						
	Issue types - Bug - Epic					Test Types Required	<ul> <li>This test run</li> </ul>	n field is req	v						
* & E	<ul> <li>- Pre-Condition</li> <li>- Story</li> <li>- Sub-bug</li> <li>- Sub-task</li> <li>- Sub Test Execution</li> </ul>								Create	Cancel					
	<ul> <li>Task</li> <li>Test</li> <li>Test Execution</li> <li>2 more issue types</li> </ul>														

- Advantages of using Jira issue types in Test Management
- Configuring Test Step Custom Fields
- Configuring Test Run Custom Fields

# Trace relationship between entities, up to the code

Xray provides full traceability between requirements, tests, their runs, and reported defects. This traceability not only provides the relation between the entities but also their status based on testing.

Traceability can be evaluated for a specific version and/or a specific environment, as its contents will depend on the testing results obtained for that specific context.

In the following screenshot, we can see an Epic that is NOK on version 1.0 even though one of the related Story issues is OK. In this example, the latest result for one of the tests (BOOK-23) that cover the Epic was a failure. It's also possible to see that a defect (BOOK-32) has been reported on that Test Run.

#### Traceability Report Switch report ~

🖞 Export 🖌

Showing 1 of 1 entries 0 🗸

Scope: Version; Version: 1.0; Environment: All Environments 🗸 👳 Contains text: BOOK-8 🗸 🜉 How to read this report

Requirement	Tests	Test Runs	Defects
BOOK-8 OPEN     I.0 - NOK     Version: 1.0     As a visitor, I can manage my Shopping     Basket	BOOK-24 OPEN Test Visitors can remove books from their shopping basket 10-PASS	PASS BOOK-31 U vero fortain Version: 1.0 Finished On:25/JFeb/19 2:07 PM Executed By:xadmin Tests environments:- Revision: S6464ug7fer	
	OBOK-25 OPEN Test a visitor can view all the books in his shopping basket 10-PASS	PASS BOCK-31 D View Details Version: 1.0 Finished On:25/Feb/19 2:07 PM Executed By:xadmin Tests environments- Revision: 656404yg7t6r	
	OBOK-23 OPEN Test visitors can add books to their shopping basket 1.0 -FAIL	FALL BOCK-31 EV two betails Version: 1.0 Finished On:25/Feb/19 2:10 PM Executed By:xadmin Tasts environments Revision:65d64uyg7t6r	BOOK-32 CLOSED Error when adding Book to shopping basket
BOOK-11 RESOLVED      I.0 - OK Version: 1.0 As a visitor, I can view all the books in my shopping basket	C BOOK-25 CREET Test a visitor can view all the books in his shopping basket 1.0 -PASS	Dock-31 Deverse beatais Version: 1.0 Finished On.25(Fich/19.2:07 PM Executed Byxadmin Tests environments	

This helps auditing and diagnosing, knowing exactly what is impacting on what.

In Jira we can even look at the code of the requirements (e.g., Epic or Story issues) to facilitate analysis. The same can also be applied to automated tests that will have a corresponding Test issue that we can reference on the code commits. This helps analyze if a potential reported bug is on the features or even on the test automation code.

14: 2 pull requests						0 Start v	vatching this issue
ID	Title	Status	Author	Reviewer	Updated	11/Mar/21 7:44 PM 49 minutes ago	
#4149		MERGED		r 12 1	3 days ago	49 minute	sago
#4136	Feature/) = 17314	MERGED		r 🔊 🔊	4 days ago	3	0
							Om Om
							1w 2d 4h 43m
							Updated 3 days ago
							Latest 3 days ago
						S MERGED	Updated 3 days ago Latest Yesterday

- Development
  - 2 branches
  - 9 commits
  - 2 pull requests MERGED

# Facilitated diagnosis and Root-Cause Analysis

Root Cause Analysis (RCA) involves answering questions like these:

Updated 3 days ago Latest 3 days ago Updated 3 days ago

- What is the root cause of a problem?
- When was a problem introduced?
- Why was the problem introduced?
- Where was the problem introduced at?
- How can it be prevented to happen in the future?

Xray helps answer these questions in multiple ways, using all the capabilities mentioned earlier.

To find when a problem was introduced, for example, we can look at coverage information which can be used to identify the status of the requirement on each version. We can then use the Traceability Report or the Test Runs List Report to see in which revision it was reported, comments and other testing evidence left.

#### Learn more:

• [Xray] Xray's features for handling Root Cause Analysis

# Learning

# Facilitated training resources to improve knowledge and ensure a seamless adoption

Understanding a tool, how it works, its recommend use, possible configurations and extensions/integrations is essential to make the most out of it and fine tune it to the team and overall process needs.

Besides the extensive user guide documentation available online, there are also many courses on Xray Academy to understand not only Xray essentials but also more specific/advanced topics, such as test automation.

#### Learn more:

- Xray Academy
- Xray server/datacenter user guide

# Standards and regulatory requirements

Standards and regulation that apply to organizations depend on the sector(s) they are working at and the type of products being developed and maintained.

For Medical Device Regulation (MDR), for example, these are some of the potential standards to consider:

- ISO 13485
- IEC 62304:2006
- ISO 14791:2019
- US FDA CFR Part 11