


How to run an Exploratory Testing Session with Jira & Xray?

**Warning: Content Compatibility Notice**

Please note that the articles in this documentation feature media from app version 2.0.5. Interface elements may differ in newer versions. Refer to the latest app version for the most accurate information.

Exploratory Testing (ET) moves a tester from a somewhat passive role to an active one, by putting the tester at the center of testing, and using their skills to explore and understand more about the test object.

Instead of going blindly over a set of predefined sets of steps and validating them against a predefined set of expected results, ET gives freedom to the tester who will decide in run time the actions to be performed.

Thus, ET is more unstructured, unpredictable and produces different results each time or whenever performed by different testers.


Exploratory sessions shouldn't be mixed up with random or ad-hoc testing; they do require, for example, a scope as a means to provide focus and overview of coverage (i.e. what is being targeted in that session).

Test charters are a "framework" commonly used in exploratory testing to provide some guidance on the exploratory testing session, SBTM (Session Based Test Management) provides a more structured approach to ET.

**Summary of concepts**

Exploratory Testing (ET) concept	Xray concept
Test charter	Test
ET session	Test Run

In Xray, exploratory testing can be abstracted using "Generic" Tests.

**Please note**

In Xray Cloud, you can use any test type as long as it is an "unstructured" test kind. By default, Xray Cloud provides the Generic test type.

In Xray Server (when available), you can use the default "Generic" test type or you can create a custom one and name it, for example, "Exploratory."

You may use the "Definition" field of the Test issue to specify the details of the test charter, including the mission. You may use the "Description" field to add additional information.

Thus, the Test issue in Xray is used as a means to specify the exploratory testing charter. It can be linked to user stories, requirements, or any coverable issue (i.e. entity targetable by testing) if you want to evaluate the impact of the results on your deliverables (i.e. from a coverage point-of-view).

Each time you perform an exploratory testing session for the defined test charter, a "test run" will be created in Xray and linked back to the Test issue.

While performing exploratory testing, you can use the **Xray Exploratory App** to take notes, record videos, take screenshots, annotate them, and more.

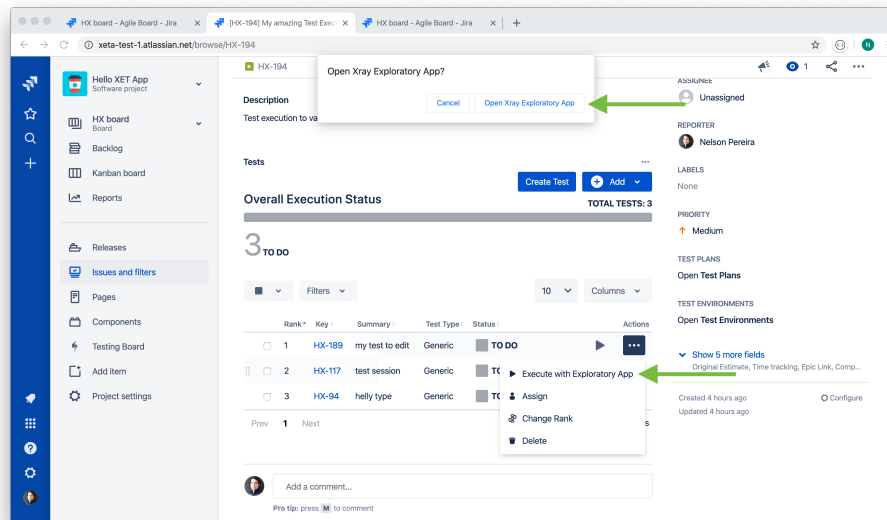
At the end of your session, you may report the status (i.e. if you consider it was successful or not, by assigning it a status such as "PASS" or "FAIL")

All notes, evidence, and statuses are reported back to the "test run" in Xray.

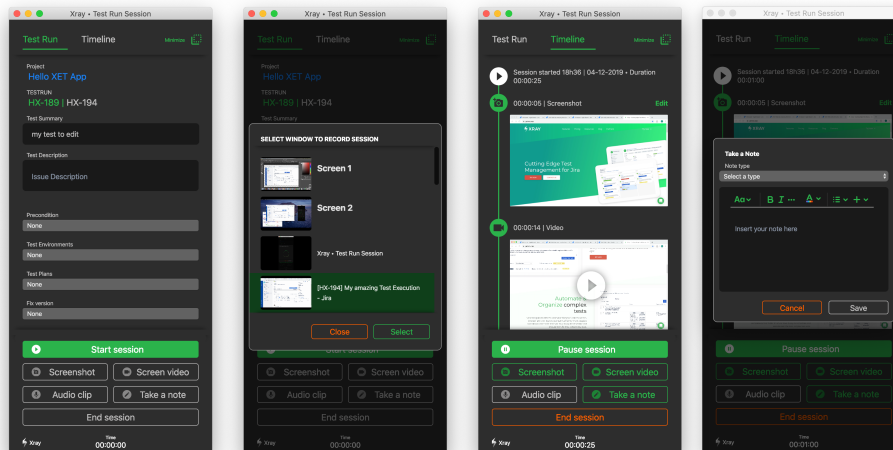
Typical flow

1. Create a (Generic) Test issue in Xray and use it to define the test charter; you will always need to have a Test entity beforehand

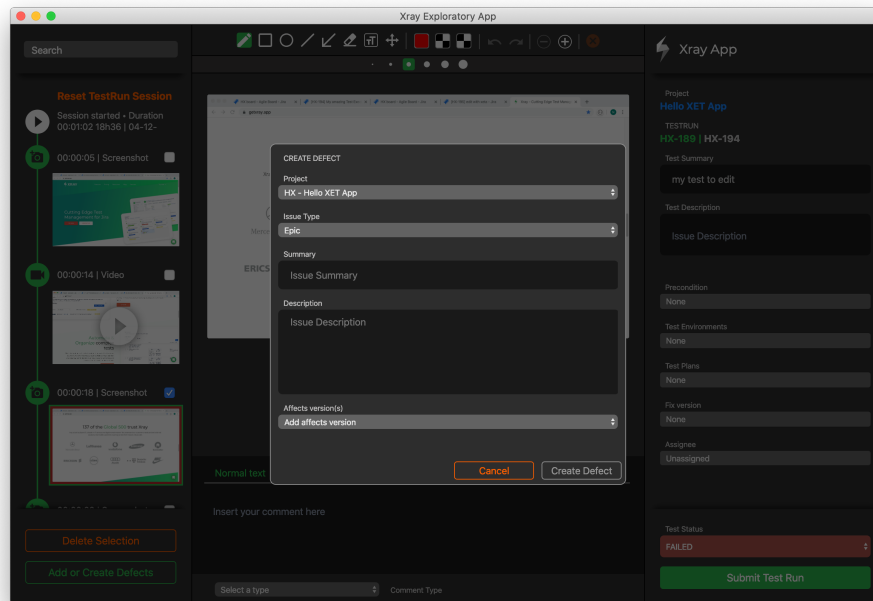
2. Link it to a story/requirement or other, if you want to have coverage visibility
3. Plan/schedule that Test as usual (e.g. add it to a Test Plan or to a Test Execution)
4. In the Test Execution issue screen, select "Execute with Exploratory App"
 - a. The Xray Exploratory App will launch and load the test data



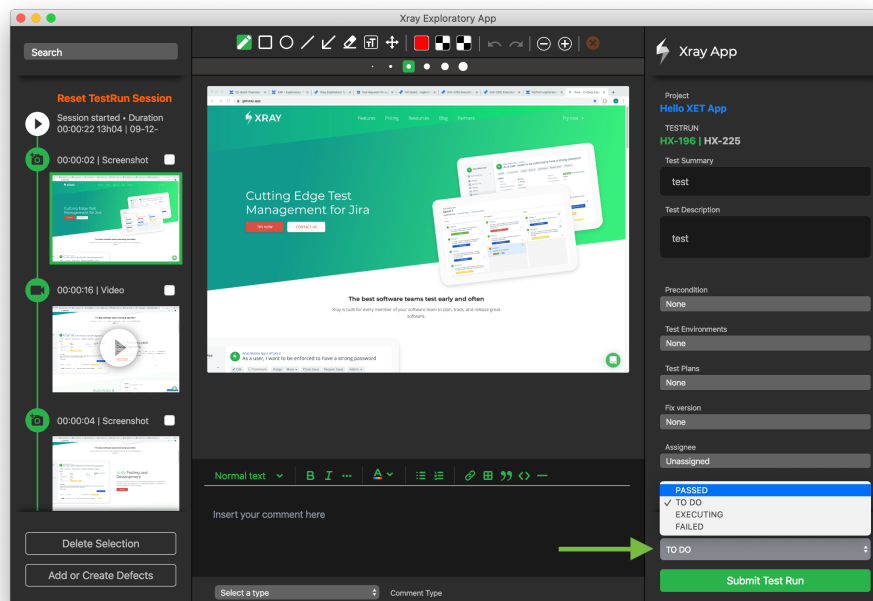
5. Perform your exploratory testing session and use the Xray Exploratory App to assist you during the process
 - a. Start by creating a new test session. Once you start testing, you can take screenshots, record videos, annotations and take notes (audio clips are coming soon).



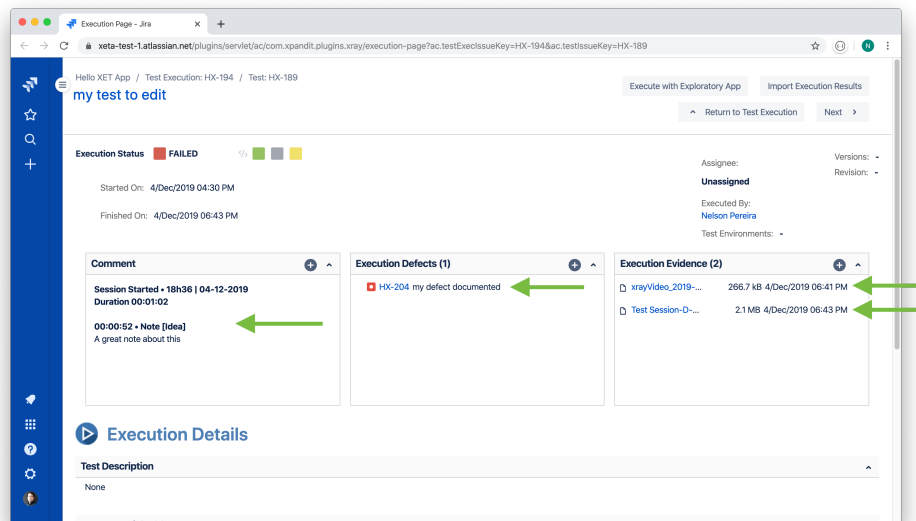
6. Submit results to Xray
 - a. When you finish your test session, just click "End Session" to load the Session Manager window. Here you can edit your timeline elements and add defects to your test run.



b. In the end, just set the status of the test run (e.g. PASS, FAIL) and submit to Xray



7. Track results in Xray, on the Test issues, or indirectly, in the covered issues (e.g. stories, requirements)
 - a. After submitting your session to Xray, you can check the test run details, including evidence. You will also automatically receive a PDF report attached to the test run, the defects created and the videos you captured during the test session.



Example of PDF report attached to the test run

The following picture shows a sample PDF report that gets attached to a test run as evidence. On the PDF you will see your entire timeline with screenshots, notes, comments, and video references in the PDF.

