Managing Test Plans

Test Management for Jira supports traditional/waterfall development and testing processes. Traditional approaches demand that you plan test assignment and execution in advance, sometimes even before any code has been released. Some software companies, however, require greater emphasis and detail about the planning phase. To meet this requirement, you can use Test Management for Jira’s test plans. Instead of using Microsoft Word or Excel to create a master test plan, you can create and customize a test plan within Jira to address a broad range of planning topics, such as scope, strategy, resources, environments, risks, and others (image below):

In order to address these additional test planning topics, you’ll need to create custom fields for the Test Plan. See in the image below a list of potential topics you can address in the Test Plan (instead of using Microsoft Word / Excel):
Test plans provide a comprehensive view of your testing effort. You can even track the test execution cycles from a higher level by linking test cycles to a test plan. In this scenario, test plans behave as a group/container of test cycles, so when you generate reports and statistics filtered by test plans, the information aggregates, and displays the test execution results, metrics, and coverage of the test cases associated with the linked test cycles, since the cycle is the container/group of test cases (image below):
Waterfall development (with Test Plans and Test-Execution Cycles)

Waterfall development (with test plans and test-execution cycles): Structured testing with formal test planning. Instead of using Microsoft Word or Excel to specify traditional test-plan documents, you can create and customize test plans with Test Management for Jira to address any planning topics, such as scope, strategy, resources, environments, risks, and more. See below the steps to manage your testing initiative with Test Plan for traditional/waterfall development methodologies:

1. Use the Tests view to manage your project’s test library. Test cases in the test library can be shared across Jira projects.
2. Use the Plans view to create a new test plan and manage high-level test planning.

3. On the Test Plan screen, add a name and other field information to the Details tab. You can create custom fields to address scope, test strategy, risks, etc, to meet test-planning requirements.
4. On the **Traceability** tab, you can link test cycles to the test plan. Test plans behave as a group of test cycles, so when you generate reports and statistics filtered by test plans, the information aggregates and displays the test-execution results, metrics, and coverage of the test cases associated with the linked test cycles.

5. Use the Cycles view to create a new test cycle and manage the test-execution cycle.
6. On the Test Cycle screen, add a name and other field information to the Details tab.

7. On the Test Cases tab, click Add Test Cases to add existing test cases from any Jira project to the cycle. You can also assign the tester responsible for executing the test case as well as a target environment.

8. The testing team can fire up the Test Player to execute the test cases planned in the Test Cycle, set results, and raise defects.
9. From the issue view, you can link test plans to the issue in the *Traceability* section.
10. From the *Reports* view, you can select a report and filter by test plan to track progress and quality of the linked test cycles. In this scenario, test plans behave as a group of test cycles, so when you generate reports and statistics filtered by test plans, the information aggregates and displays the test-execution results, metrics, and coverage of the test cases associated with the linked test cycles, since the cycle is the container/group of test cases.
Next Steps

- Start your free 30-day trial now.

Have a question for us?

- Please submit a support request. We're happy to help!