



SpiraPlan® | Quick Start Guide  
Inflectra Corporation

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# Introduction

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The Spira™ family of applications from Inflectra® are a powerful set of tools that help you manage your software lifecycle.

SpiraPlan® provides a complete Enterprise Agile Planning® solution that lets you manage products, programs and the entire organization with ease, and the requirements, releases, test cases, issues, risks, and tasks they contain.

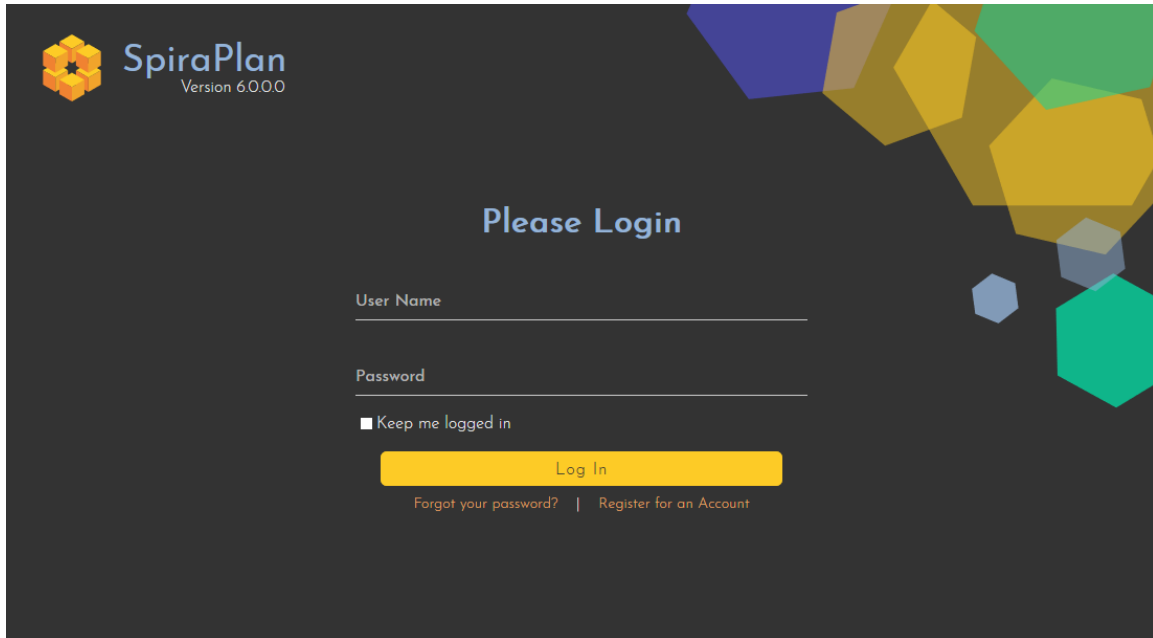
This guide provides a step-by-step tutorial for creating a sample SpiraPlan product, adding some requirements and releases, building the test plan, assigning the backlog items to the various sprints, executing the tests and logging defects, and finally triaging and resolving the bugs/issues raised.

For further information on using SpiraPlan, please refer to the more comprehensive *SpiraPlan User Manual*.

For information on setting up a new SpiraPlan instance, creating products and users and other administration tasks, please refer to the *SpiraPlan Administration Guide*.

# 1. Logging In and Selecting a Product

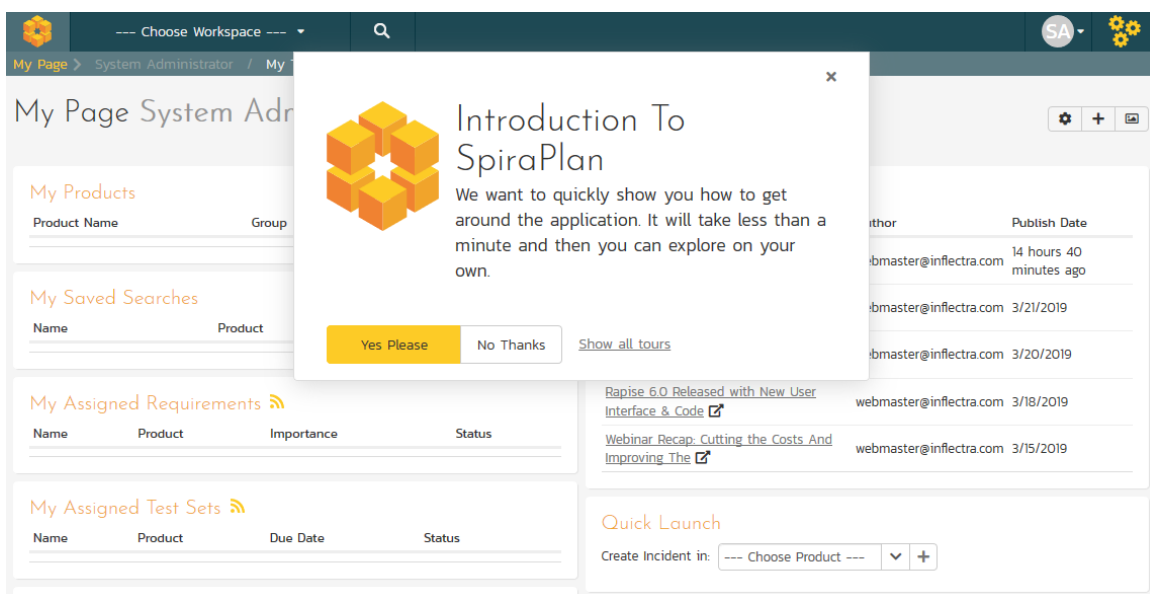
Once you have installed a self-hosted trial or signed up for a hosted trial of SpiraPlan, you should see the following login screen in your web browser:



Enter the following default details to start using the system:

- Login: administrator
- Password: PleaseChange

Once logged-in, you are shown your "My Page". The very first time you log in you will be able to take a quick orientation tour of the application (as shown in the screenshot below).



The My Page looks pretty empty right now. This is normal.

**My Products**

Product Name	Group	Creation Date
Library Information System (Sample)	Sample Program One	22-Sep-2018
Sample Barebones Product	Sample Program One	22-Sep-2018
Sample Empty Product	Sample Program Two	22-Sep-2018
simon_testing	Default Program	20-Feb-2019

**My News Feeds**

Headline	Author	Publish Date
SpiraTest Integration with JasmineJS Now Available	webmaster@inflectra.com	16 hours 37 minutes ago
Webinar Recap: Mastering Four Ceremonies Of Better	webmaster@inflectra.com	2/18/2019
Inflectra Offices Closed for U.S. Presidents' Day	webmaster@inflectra.com	2/15/2019
Challenges in Agile Project Delivery	webmaster@inflectra.com	2/15/2019
Free Webinar: Mastering Four Ceremonies Of Better	webmaster@inflectra.com	2/13/2019

**My Saved Searches**

Name	Product

**My Assigned Requirements**

Name	Product	Importance	Status

**My Assigned Test Sets**

Name	Product	Due Date	Status

**My Assigned Test Cases**

Name	Product	Status	Last Executed

**Quick Launch**

Create Incident in:

**My Contacts**

Name	Department	Online	Operations

**My Assigned Risks**

Name	Product	Type	Exposure	Review Date

For this tutorial we want to start with an empty product that has no data in it, so click the hyperlink under 'My Products' for 'Sample Empty Product' / 'Sample Program Two'. That will bring up the homepage for the empty product:

**Sample: Empty Product PR3**

Displaying: --- All Releases ---

**Product Overview**

Program: Sample Program Two  
 Web Site:  
 Owner(s): System Administrator

**Activity Stream** [View All](#)

**Shared Searches**

Name	Creator

**Requirements Summary** [View Details](#)

Status	1 - Critical	2 - High	3 - Medium	4 - Low	(None)	TOTAL
TOTAL						

**Requirements Coverage** [View Details](#)

1

**Top Open Issues** [View All](#)

Description	Priority	Owned By	Date Opened

**Risk Summary** [View All](#)

Impact	Probability				
	Rare	Unlikely	Possible	Likely	Certain
Catastrophic					
Critical					
Marginal					
Negligible					

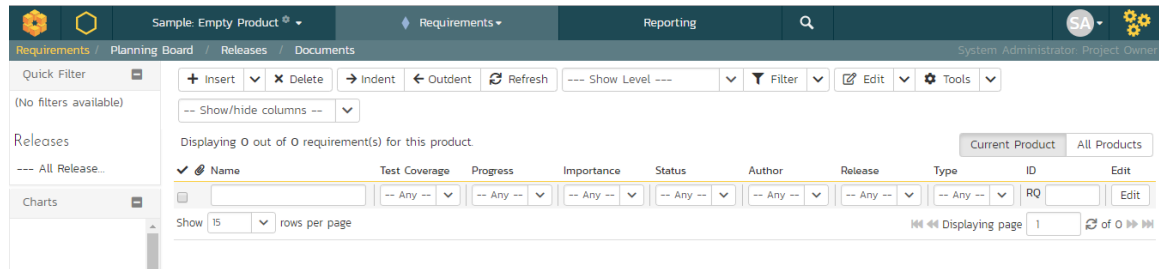
**Top Open Risks** [View All](#)

Description	Exposure	Type	Owned By	Review Date

The product home page shows various widgets containing key product metrics. These are empty now, because the product has no data in it. In the rest of this guide we are going to fix that.

## 2. Define the Requirements

On the main Navigation bar, click Artifacts > Requirements to display the product's requirements list page:



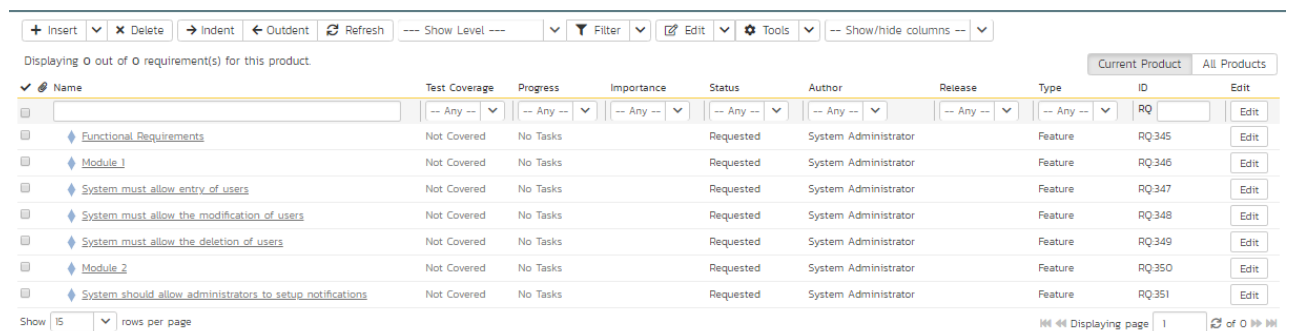
The terminology in SpiraPlan is designed to be methodology agnostic. The table below shows how the terms used in SpiraPlan relate to some common methodologies:

SpiraPlan	Extreme Programming	Scrum	AgileUP / DSDM
Summary Requirement	Epic	Epic	Feature Group
Requirement	User Story	Backlog Item	Requirement
Task	Task	Task	Task
Release	Release	Release	Release
Sprint	Iteration	Sprint	Iteration

At first, the requirements list will be empty. Click the 'Insert' button in the toolbar to create your first requirement. Hit 'Save and New' (shown as buttons on the right of the new requirement in the list table) to add each new requirement after that. Below is the list of requirement names to add:

1. Functional Requirements
2. Module 1
3. System must allow entry of users
4. System must allow the modification of users
5. System must allow the deletion of users
6. Module 2
7. System should allow administrators to setup notifications

You should now have a simple, flat requirements list, like the one below:



Next, we are going to indent the requirements. This will give us a hierarchy, with some requirements being children of others.

1. To indent, select the checkboxes of all the requirements below 'Functional Requirements' and click 'Indent'. This makes 'Functional Requirements' the parent and all the other requirements its children.
2. Now, select the three requirements immediately below 'Module 1' and click 'Indent' again. This makes these three requirements children of 'Module 1' (and grandchildren of 'Functional Requirements')
3. Repeat for the requirement below 'Module 2' by right-clicking on this last requirement and choosing 'Indent' from the popup context menu.

You should now have a list that looks like:

Displaying 7 out of 7 requirement(s) for this product.

✓ Name

- 
- Functional Requirements**
- Module 1**
- System must allow entry of users**
- System must allow the modification of users**
- System must allow the deletion of users**
- Module 2**
- System should allow administrators to setup notifications**

We now have a nicely group set of requirements. Let's enter more information about them, starting with setting their types and priorities.

1. Click the "select all" checkbox at the top of the list (the checkbox just above the checkbox for 'Functional Requirements')
2. Click on the top 'Edit' button in the right-hand column of that same row. That will make all the requirement rows editable:

Displaying 7 out of 7 requirement(s) for this product

✓  Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	ID	Edit
<input type="checkbox"/> <input type="text"/>	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	RQ	<input type="text"/>
<input checked="" type="checkbox"/> <b>Functional Requirements</b>	Not Covered	No Tasks	-- None --	Requested	System Ad	-- None --	Package	RQ345	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/> <b>Module 1</b>	Not Covered	No Tasks	-- None --	Requested	System Ad	-- None --	Package	RQ346	
<input checked="" type="checkbox"/> <b>System must allow entry of use</b>	Not Covered	No Tasks	-- None --	Requested	System Ad	-- None --	Feature	RQ347	<input type="button" value="Save"/> <input type="button" value="Cancel"/>
<input checked="" type="checkbox"/> <b>System must allow the modifica</b>	Not Covered	No Tasks	-- None --	Requested	System Ad	-- None --	Feature	RQ348	
<input checked="" type="checkbox"/> <b>System must allow the deletion</b>	Not Covered	No Tasks	-- None --	Requested	System Ad	-- None --	Feature	RQ349	
<input checked="" type="checkbox"/> <b>Module 2</b>	Not Covered	No Tasks	-- None --	Requested	System Ad	-- None --	Package	RQ350	
<input checked="" type="checkbox"/> <b>System should allow administra</b>	Not Covered	No Tasks	-- None --	Requested	System Ad	-- None --	Feature	RQ351	

Show 15 rows per page

Displaying page 1 of 1

3. Set the 'Type' of the four requirements you can edit this for to User Story'.
4. Choose whatever values you like for the 'Importance' field.
5. Click the 'Save' button.

You now have a prioritized list of user story requirements:

The next thing we can do is assign estimates to each requirement. This is something that the developers or business analysts may do based on the complexity and scope of each. The 'Estimates' column is not visible yet, so first we need to show it. To do that, click on the 'Show/Hide Columns' dropdown list and select 'Show Estimate':

By default, all the requirements will have been assigned a default estimate of 1.0 point. A point is not a defined number of hours, but an indication of the size of the requirement. The estimates should reflect how big each of the requirements are relative to each other.

To change the estimates:

1. Click the "select all" checkbox at the top of the list
2. Click on the top 'Edit' button in the right-hand column. The requirements should be in editable mode again.
3. Enter the following estimates for the requirements
4. Click 'Save'

Requirement	Estimate
System must allow entry of users	1.5 points
System must allow the modification of users	2.0 points
System must allow the deletion of users	1.0 points
System should allow administrators to setup notifications	2.0 points

Your requirements should now look like this (with each parent's estimates automatically summing up the estimates of their children):

Requirements / Planning Board / Releases / Documents System Administrator: Project

Quick Filter (No filters available) + Insert X Delete Indent Outdent Refresh Show Level Filter Edit Tools Show/Hide columns

Releases (No filters available) --- All R. Current Proc

Charts 7

- Passed
- Failed
- Blocked
- Caution
- Not Run

Displaying 7 out of 7 requirement(s) for this product.

Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	Estimate
Functional_Requirements	Not Covered	No Tasks	1 - Critical	Requested	System Administrator		Package	6.5
Module 1	Not Covered	No Tasks	1 - Critical	Requested	System Administrator		Package	4.5
System must allow entry of users	Not Covered	No Tasks	2 - High	Requested	System Administrator		User Story	1.5
System must allow the modification of users	Not Covered	No Tasks	2 - High	Requested	System Administrator		User Story	2.0
System must allow the deletion of users	Not Covered	No Tasks	3 - Medium	Requested	System Administrator		User Story	1.0
Module 2	Not Covered	No Tasks	1 - Critical	Requested	System Administrator		Package	2.0
System should allow administrators to setup notifica	Not Covered	No Tasks	3 - Medium	Requested	System Administrator		User Story	2.0

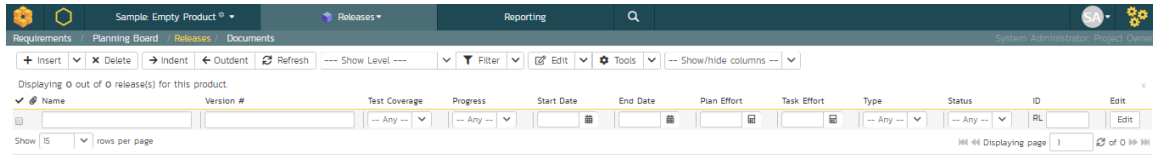
Show 15 rows per page 100% 44 Displaying page

We have created a list of prioritized, estimated requirements, which is a great way to start our product. In the next section we are going to enter releases and sprints.



# 3. Create the Release and Iteration Plan

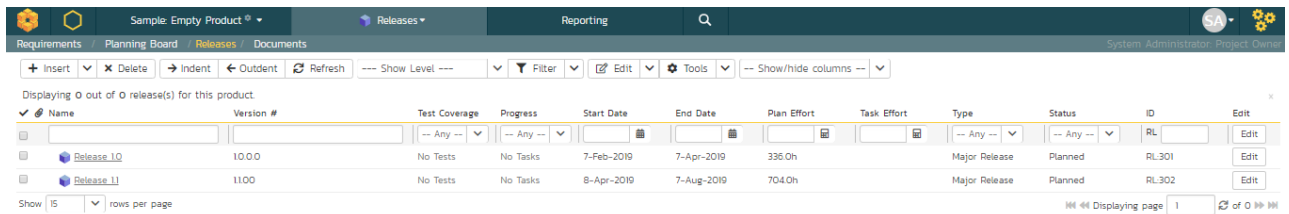
On the main navigation bar, click out of 'Requirements' and select 'Releases' menu option to display the product's release list page:



The release list will be empty. Click the 'Insert' button in the toolbar to create your first release. Hit 'Save and New' (shown as buttons on the right of the new release in the list table) to add each new release after that. Below is the list of release names to add

- Release 1.0 - version number 1.0.0.0
  - Start Date: Today's Date
  - End Date: Today's Date + 2 months
- Release 1.1 - version number 1.1.0.0
  - Start Date: Today's Date + 2 months
  - End Date: Today's Date + 4 months

You should have a list of releases like this:



We need to add one additional level of detail to each release - the list of sprints that will take place in each release.

Let's add some sample sprints for the first release.

1. Select the checkbox for Release 1.0 and, from the toolbar, click Insert > Child Release.
2. Choose a name for the new sprint
3. Make sure its 'Type' is set to 'sprint'
4. Specify its date-range. We recommend making each sprint last 2-weeks and have each one scheduled in series
5. click 'Save And New'.
6. Repeat steps 2-5 above, then steps 2-4 and then finally click 'Save' on the final sprint's row. You should have three sprints added to the list, all children of Release 1.0

Requirements / Planning Board / Releases / Documents System Administrator, Project Owner

Displaying 5 out of 5 release(s) for this product

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit
Release 10 - version number 10.0.0	10.0.0	No Tests	No Tasks	20-Feb-2019	20-Apr-2019	344 Oh		Major Release	Planned	RL-320	Edit
Release 10 - Iteration 1	10.0.0.0000	No Tests	No Tasks	20-Feb-2019	6-Mar-2019	88 Oh		Sprint	Planned	RL-327	Edit
Release 10 - Iteration 2	10.0.0.0001	No Tests	No Tasks	7-Mar-2019	21-Mar-2019	88 Oh		Sprint	Planned	RL-328	Edit
Release 10 - Iteration 3	10.0.0.0002	No Tests	No Tasks	22-Feb-2019	5-Apr-2019	248 Oh		Sprint	Planned	RL-329	Edit
Release 11 - version number 11.0.0	11.0.0	No Tests	No Tasks	20-Feb-2019	20-Jun-2019	696 Oh		Major Release	Planned	RL-321	Edit

Show 15 rows per page Displaying page 1 of 1

Finally, let's specify the number of resources assigned to each sprint and release.

1. Click on the 'Show/Hide Columns' dropdown list and select 'Show # Resources' column
2. Select the three checkboxes for the sprints of "Release 1.0"
3. Click the 'Edit' button on the toolbar.
4. Adjust the # resources for the sprints to 2.
5. Click 'Save':

Requirements / Planning Board / Releases / Documents System Administrator, Project Owner

Displaying 5 out of 5 release(s) for this product

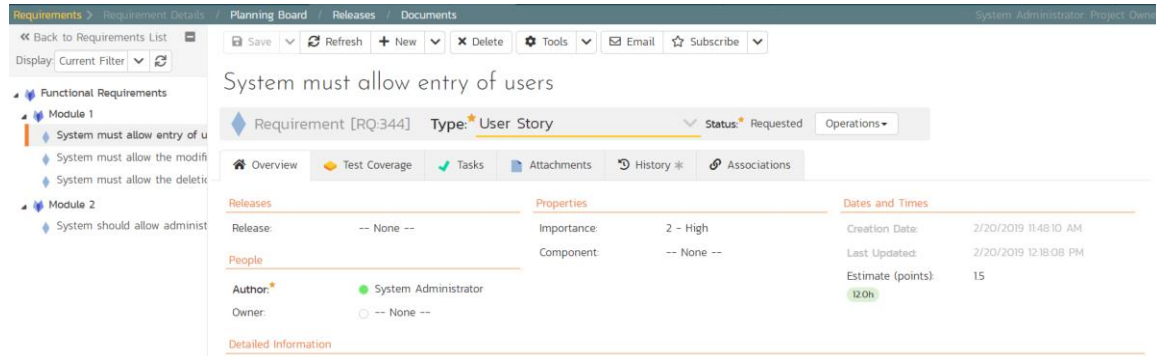
Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	# Resources	Status	ID	Edit
Release 10 - version number 10.0.0	10.0.0	No Tests	No Tasks	20-Feb-2019	20-Apr-2019	344 Oh		1	Planned	RL-320	Edit
Release 10 - Iteration 1	10.0.0.0000	No Tests	No Tasks	20-Feb-2019	6-Mar-2019	176 Oh		2	Planned	RL-327	Edit
Release 10 - Iteration 2	10.0.0.0001	No Tests	No Tasks	7-Mar-2019	21-Mar-2019	176 Oh		2	Planned	RL-328	Edit
Release 10 - Iteration 3	10.0.0.0002	No Tests	No Tasks	22-Mar-2019	5-Apr-2019	176 Oh		2	Planned	RL-329	Edit
Release 11 - version number 11.0.0	11.0.0	No Tests	No Tasks	20-Feb-2019	20-Jun-2019	696 Oh		1	Planned	RL-321	Edit

Show 15 rows per page Displaying page 1 of 1

# 4. Adding Requirement Tasks

We have defined the high-level schedule for Release 1.0. The next stage is to have the developers take each of the requirements defined so far and define the various tasks needed to deliver them. Each task will have its own estimate associated with it. In addition, you can optionally specify date-ranges and priorities to each of the individual tasks.

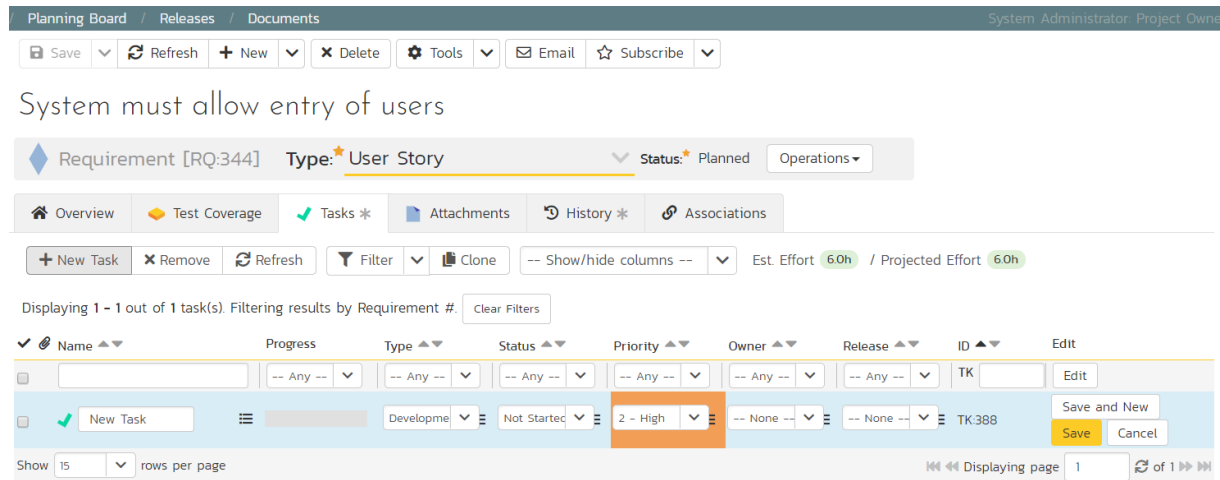
To start adding tasks, go to the main navigation bar and click out of Releases and hit Requirements to display the requirements list. Click on the hyperlink for the first requirement ("System must allow entry of users") and the requirement's details page will be displayed:



Notice that under 'Dates and Times' column on the right, the system displays an initial resource estimate of 1.5 points and 12 hours. This is based on an initial product setting of 8 hours per story point. Once you start adding tasks and getting metrics based on the actual team velocity (how many story points they can accomplish in a given time frame), the system can update that conversion metric.

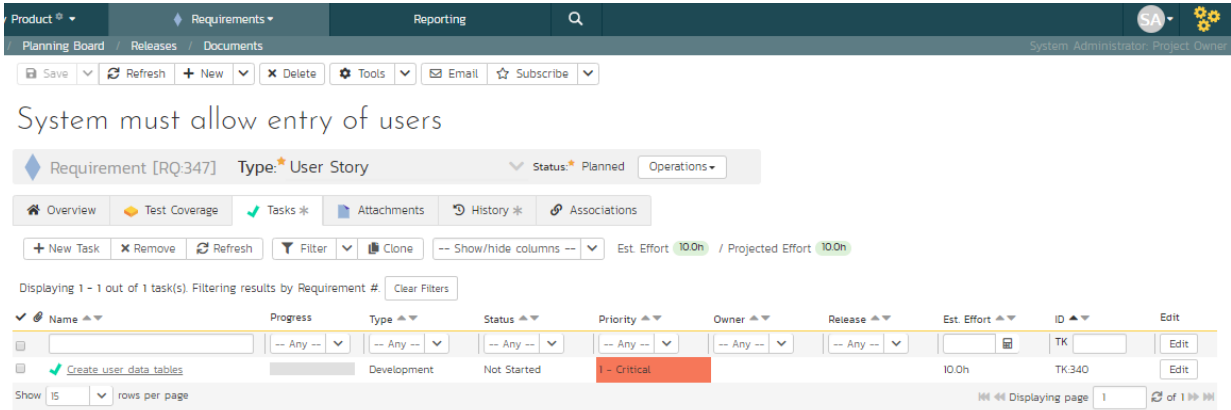
Click on the 'Tasks' tab to display the list of tasks defined for this requirement. The list is empty, so let's change that:

1. Because we want to enter the estimated effort for each task, before entering the tasks, first click on the 'Show/Hide Columns' dropdown list and hit the 'Show Est. Effort' column.
2. Click the 'New Task' button (this adds a new task and associated it with this requirement)



3. Set the task's name to "Create user data tables"
4. Choose a 'Priority' level
5. Set the 'Est. effort' to 10.0h.
6. Click 'Save'.

The new task has now been added:



We have more tasks to add. The table below shows 12 tasks in total to add to 4 different requirements. This includes the one we just created for completeness.

Requirement / Task	Est. Estimate
<b>System must allow entry of users</b>	
Create user data tables	10.0h
Develop user business object	10.0h
Build user creation screens	20.0h
<b>System must allow the modification of users</b>	
Extend user business object to handle updates	5.0h
Add user list page	15.0h
Add user details page	20.0h
Add user permissions page	15.0h
<b>System must allow the deletion of users</b>	
Extend user business object to handle deletes	5.0h
Update user list page to add delete functionality	10.0h
<b>System should allow administrators to setup notifications</b>	
Create user administration home page	15.0h
Add user settings for notifications to database	10.0h
Create user notifications administration page	20.0h

On the main Navigation bar, click again on 'Requirements'. You should now have the following requirements list page. In this screenshot we have hidden the 'Author' field and shown the 'Task Effort' field to show the detailed task effort aggregated up to the requirements.

Name	Test Coverage	Progress	Importance	Status	Release	Task Effort	Type	Estimate	ID	Edit
Functional Requirements	Not Covered			Planned		155.0h	Package	65	RQ 345	Edit
Module 1	Not Covered			Planned		110.0h	Package	45	RQ 346	Edit
System must allow entry of users	Not Covered			Planned		40.0h	User Story	15	RQ 347	Edit
System must allow the modification of users	Not Covered			Planned		55.0h	User Story	2.0	RQ 348	Edit
System must allow the deletion of users	Not Covered			Planned		15.0h	User Story	1.0	RQ 349	Edit
Module 2	Not Covered			Planned		45.0h	Package	2.0	RQ 350	Edit
System should allow administrators to setup notifications	Not Covered			Planned		45.0h	User Story	2.0	RQ 351	Edit

The total number of hours for these tasks divided by the total number of story points, gives a number a lot more than the 8 hours that the system assumes. We can update the system to better estimate then number of hours to deliver each story point.

To update the metric, go to the three cogs dropdown menu on the rightmost corner of the main Navigation Bar, locate Planning and click Planning Options:

**Planning Options** Sample: Empty Product

The following schedule and calendar options are currently being used by this product. To change the settings, just modify the values and then click [Save] to commit the changes.

Once you are happy with the changes, it is recommended you refresh the schedule and progress information in the product through the [Data Caching](#) administration screen.

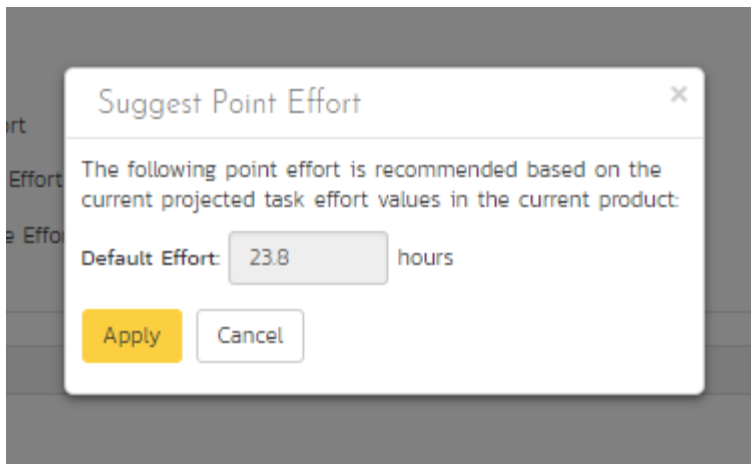
**General**

- Work Hours Per Day: 8 hours
- Work Days Per Week: 5 days
- Non-Working Hours Per Month: 0 hours
- Effort Calculations:
  - Include Task Effort
  - Include Incident Effort
  - Include Test Case Effort

**Requirements**

- Default Estimate: 1.0 points
- Point Effort: 8.0 hours
- This is the conversion factor used to determine the number of person-hours per estimated point.
- Auto-Create Tasks:  Create a new task when Requirement becomes 'In-Progress'
- Auto-Planned:  When you assign a release to a requirement, it changes to the 'Planned' status automatically.
- Use Task Status:  When all tasks switch to Completed, the associated requirement will change status to Developed automatically.
- Use Test Status:  When all test cases are Passed, the associated requirement will change status to Tested automatically.

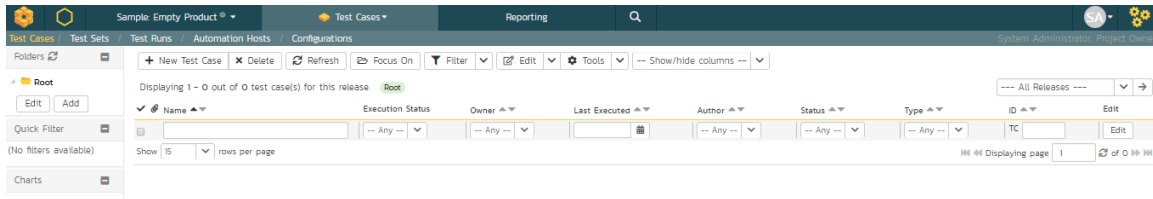
As you can see, the system lists 8.0 hours as the current number of hours required to deliver a single story point of functionality. Now that we have some actual tasks in the product, click on the 'Suggest' button to have the system provide its suggestion of the new metric:



Click the 'Apply' button to update the planning metric, and then click the main 'Save' button at the very bottom of the page to confirm the change.

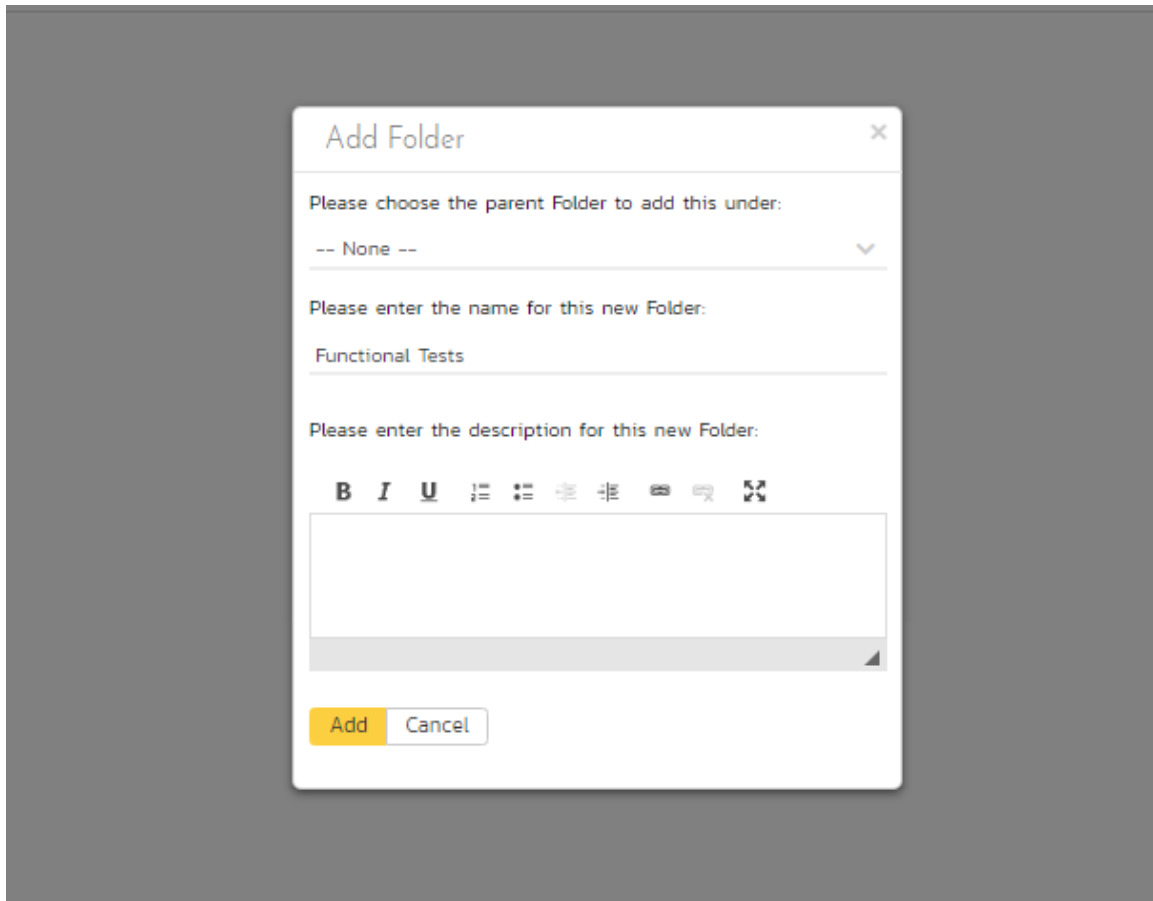
# 5. Adding the Test Cases

Click on the Artifacts > Test Cases menu option to display the product's test case list page:

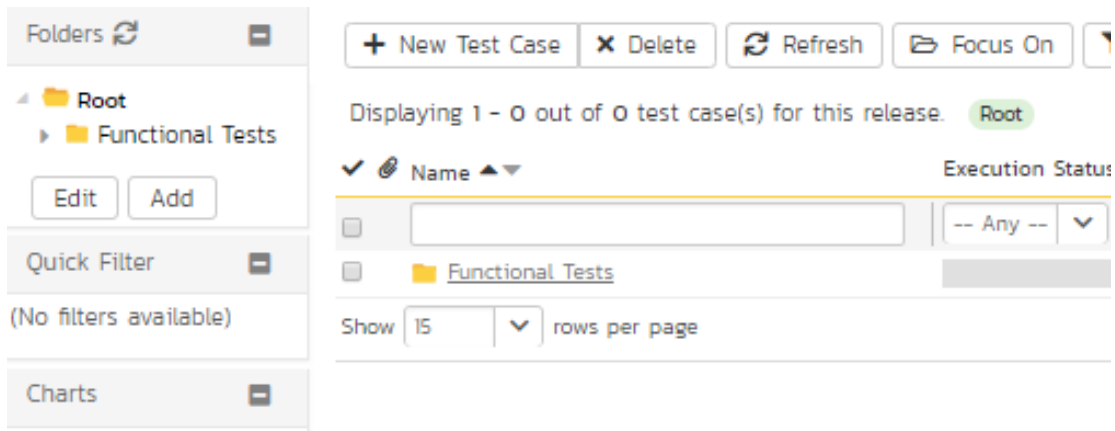


The test case list is empty and the only folder visible in the 'Folders' tree on the left-hand side is 'Root'.

1. Click on the 'Add' button underneath the folder tree,
2. Enter the new folder name 'Functional Tests'.
3. Click 'Add'.

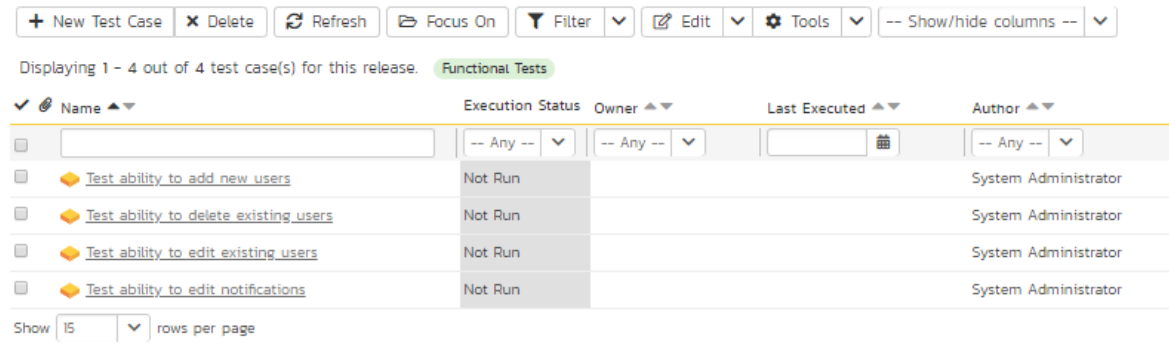


4. You now have a new folder in the 'Folders' tree view. To show it, click 'Refresh'.



5. Click on this folder from the 'Folders' tree on the left
6. Click 'New Test Case' from the toolbar.
7. Enter "Test ability to add new users" for the name of this new test case
8. Click 'Save And New'
9. Repeat the above steps to create 3 more test cases:
  1. Test ability to edit existing users
  2. Test ability to delete existing users
  3. Test ability to edit notifications

You should now have the following test case list:



Next, we need to enter detailed test steps to each test case, and link each test to the appropriate requirements.

1. Click on the hyperlink for the first test case 'Test ability to add new users'. This will bring up the test case details page



2. In the 'Description' box under 'Detailed Information' section, enter a brief overview of the test case (something like "this test case verifies that you can add new users to the system and that all of the fields get saved correctly.").
3. Scrolling down to the 'Test Steps' section, you will see a single test step has been automatically created for you with some suggested text:

This test case needs 3 test steps.

1. Click 'Edit' on 'Step 1' and enter the first set of parameters below.
2. Click 'Save and New' to add the second test step and enter its information from below
3. Click 'Save and New' again to make the third step
4. Once you've entered its information click 'Save'

Test Step Description	Expected Result	Sample Data
Click on the link to add new user	New user screen displayed	
Enter the name, email address and password of the new user.	Data accepted	Fred Bloggs <a href="mailto:fredblogs@aol.com">fredblogs@aol.com</a>
Click the 'Submit' button to create the user.	The user is created	

You should now have the following test steps in the test case:

Next, we need to link this test case to the requirement(s) that it validates.

1. Click the 'Req. Coverage' tab above:

Save Refresh + New Delete Execute Tools Email Subscribe

/ Functional Tests

## Test ability to add new users

Test Case [TC:204] Status: Draft Operations Execution Status: Not Run

Overview Req. Coverage Test Runs Releases Incidents Attachments Test Sets Tasks History \*

+ Add Remove Refresh Filter

Displaying 1 - 0 out of 0 association(s).

Type	Name	Status	Importance	Product Name
-- Any --		-- Any --	-- Any --	-- Any --

Show 15 rows per page

2. Click the '+ Add' button to display the association adding panel:

Current Product: All Packages Filter by name, or search by ID (e.g. RQ:4) Search

ID	Name	Product
RQ-342	Functional Requirements	Sample: Empty Product
RQ-343	Module 1	Sample: Empty Product
RQ-387	System must allow entry of users	Sample: Empty Product
RQ-345	System must allow the modification of users	Sample: Empty Product
RQ-346	System must allow the deletion of users	Sample: Empty Product
RQ-347	Module 2	Sample: Empty Product
RQ-348	System should allow administrators to setup notifications	Sample: Empty Product

Save Cancel + Create Requirement From This Test Case

3. Choose the 'System must allow the entry of users' requirement
4. Click the 'Save' button beneath the list of requirements to add the test case to this requirement

## Test ability to add new users

Test Case [TC:219] Status: Draft Operations Execution Status: Not Run

Overview Req. Coverage Test Runs Releases Incidents Attachments Test Sets Tasks History \*

+ Add Remove Refresh Filter

Displaying 1 - 1 out of 1 association(s).

Type	Name	Status	Importance	Product Name	ID
User Story	System must allow entry of users	Planned	2 - High	Sample: Empty Product	RQ387

Show 15 rows per page

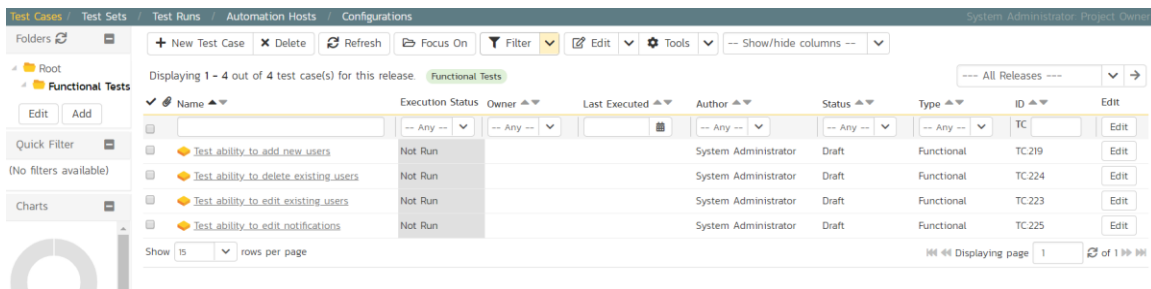
Displaying page 1 of 1

Let's repeat the process for the other test cases, adding a couple of test steps to each. Then link the test cases to the requirements according to this table just like you did above:

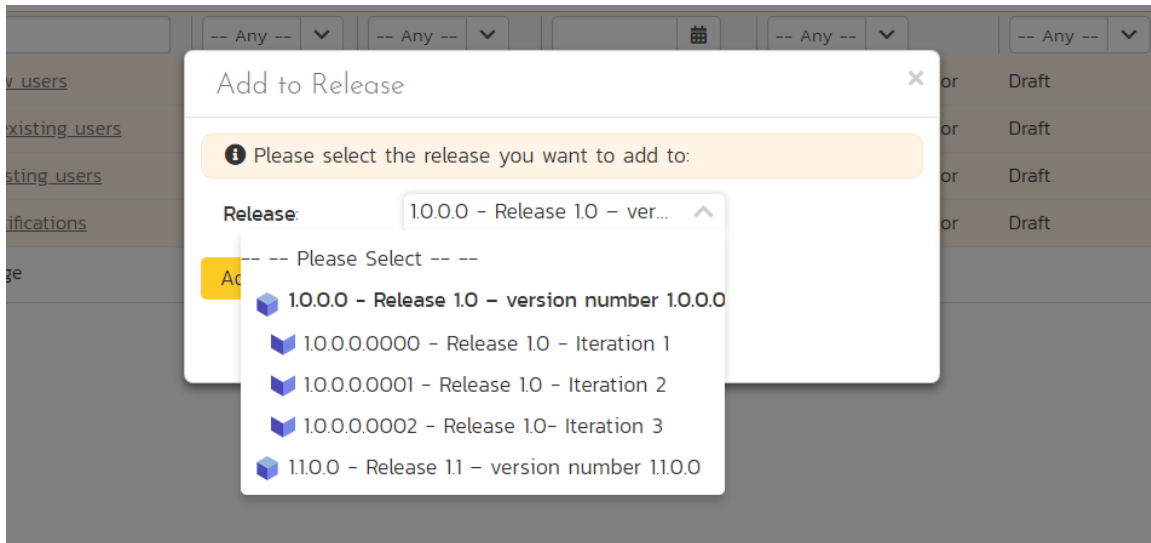
Test Case	Requirement
Test ability to add new users	System must allow entry of users
Test ability to edit existing users	System must allow the modification of users
Test ability to delete existing users	System must allow the deletion of users
Test ability to edit notifications	System should allow administrators to setup notifications

We have created test cases and set up their test coverage. Next, we need to specify which releases and sprints they can be tested in.

1. First navigate to the product's test case list page again by clicking on 'Test Cases' on the main navigation bar



2. Select the checkbox of each test case in the 'Functional Tests' folder.
3. Click on 'Tools' drop-down menu on the toolbar
4. Click 'Add to Release'



5. Select 'Release 1.0'
6. Click 'Add'.

You have added all the tests to the overarching Release. Finally, we want to add the tests to the different sprints, based off the data in the table below.

1. Select the checkbox of each relevant test case in the 'Functional Tests' folder.
2. Click on 'Tools' drop-down menu on the toolbar
3. Click 'Add to Release'

4. Select the appropriate sprint
5. Click 'Add'

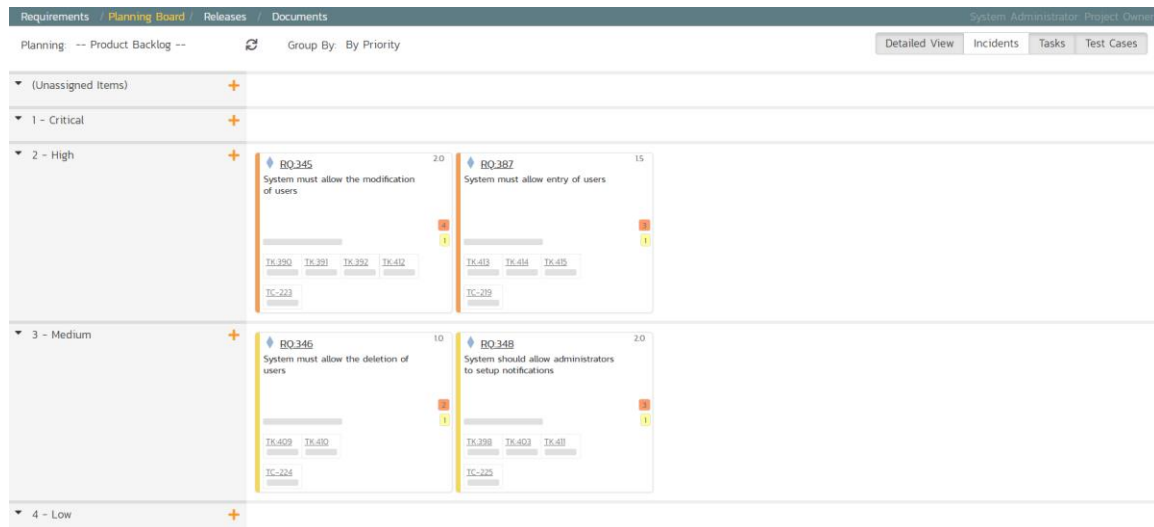
Test Case	Sprint(s)
Test ability to add new users	Release 1.0 - Iteration 1 Release 1.0 - Iteration 2 Release 1.0 - Iteration 3
Test ability to edit existing users	Release 1.0 - Iteration 1 Release 1.0 - Iteration 2 Release 1.0 - Iteration 3
Test ability to delete existing users	Release 1.0 - Iteration 2 Release 1.0 - Iteration 3
Test ability to edit notifications	Release 1.0 - Iteration 3

You typically want to include previous functionality in each of the successive iterations to ensure regression coverage. That is what we have done here. This means that each sprint includes new test cases for the new requirements, as well as existing test cases for pre-existing functionality.

# 6. Planning the Sprint

We have requirements that have tasks, and tests connected to them. What we haven't done yet is scope out which requirements go in which sprint.

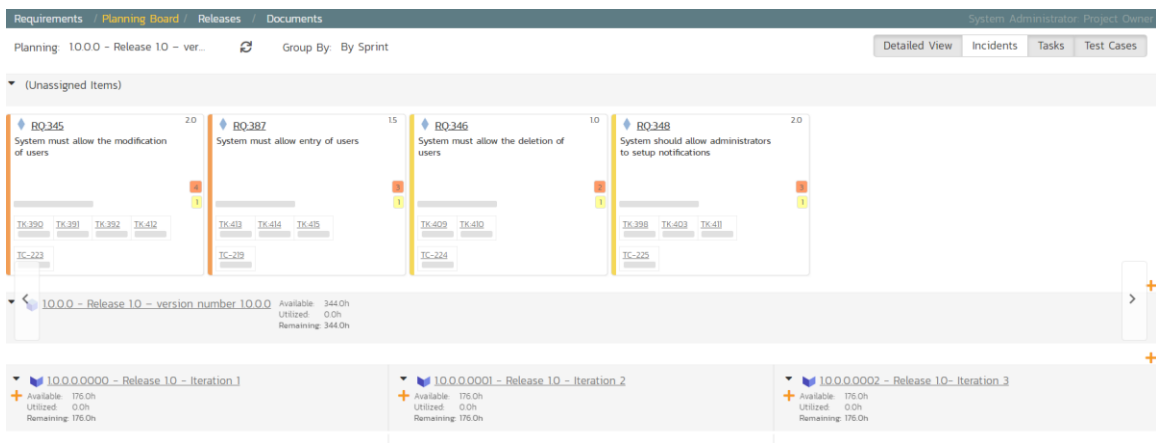
1. On the main Navigation Bar, click on the Planning > Planning Board option on the main menu to display the product backlog planning board.
2. Make sure the 'Group By' dropdown on the left is set to "By Priority"
3. Make sure all requirements are visible by checking the left-most column and ensuring that all priority levels are shown in an expanded view (downward facing triangle signs)



4. To view the iteration plan for a specific release, select 'Release 1.0' on the 'Planning:' drop down menu on the top left.
5. Choose 'By Sprint' from the drop-down 'Group By' menu. That will display the sprint plan for the selected release (currently empty)

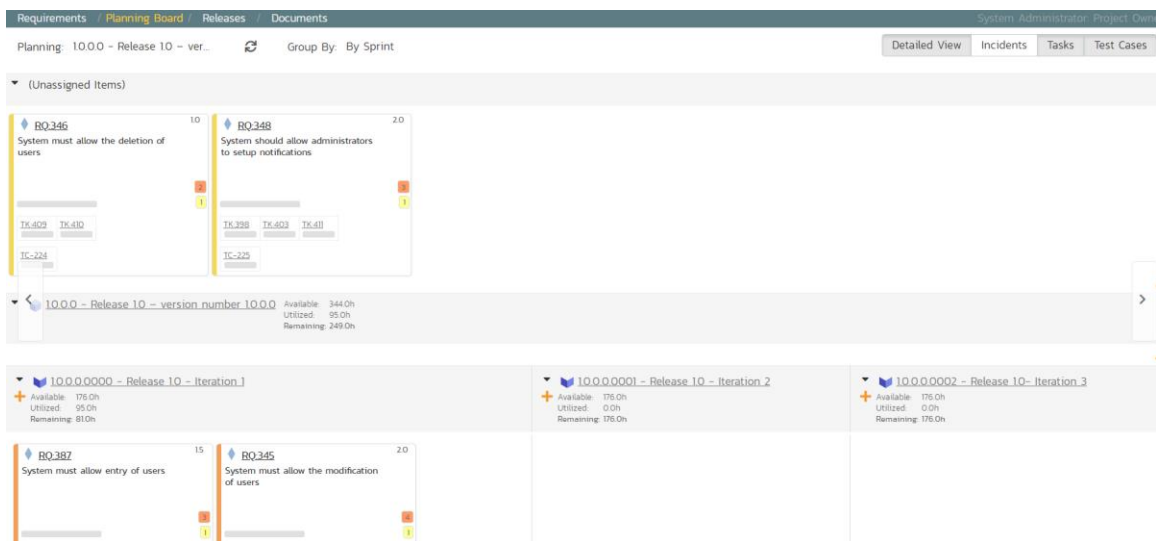


6. Expand the '(Unassigned Items)' entry to display the requirements that are in the product backlog



Each backlog item (requirement or incident) is represented by a virtual “story card” in the iteration. The left-hand side of each item displays the priority color. The progress bar near the bottom of each item depicts the progress of the item. You can flip through each iteration to see the work planned by clicking the left/right arrow buttons at the sides of the screen.

Now drag the two highest priority requirements (the ones with Importance = 1-Critical) to the first iteration:



In the screenshots above the cards are showing more information than you may see by default. Extra information can be shown by toggling the buttons at the top right of the planning board

- To see more information about each requirement, enable the ‘Detailed View’ option
- To see the individual tasks associated with each requirement, select the ‘Tasks’ option
- To see the individual tests associated with each requirement, select the ‘Test Cases’ option

You can determine how much time has been scheduled in the first sprint and how much time is remaining. Although we have spare time available in Iteration 1, we will leave room left for fixing incidents, so next, drag and drop the remaining two requirements to Iteration 2:

Requirements / Planning Board / Releases / Documents System Administrator Project Owner

Planning 10.0.0 - Release 10 - ver... Group By: By Sprint Detailed View Incidents Tasks Test Cases

▼ (Unassigned Items)

▼ 10.0.0 - Release 10 - version number 10.0.0 Available: 344 Oh  
Utilized: 195 Oh  
Remaining: 149 Oh

▼ 10.0.0.0000 - Release 10 - Iteration 1 Available: 176 Oh  
Utilized: 95 Oh  
Remaining: 81 Oh

▼ 10.0.0.0001 - Release 10 - Iteration 2 Available: 176 Oh  
Utilized: 60 Oh  
Remaining: 116 Oh

▼ 10.0.0.0002 - Release 10 - Iteration 3 Available: 176 Oh  
Utilized: 0 Oh  
Remaining: 176 Oh

RO-345 20

System must allow the modification of users

TC-323

RO-387 15

System must allow entry of users

TC-329

RO-346 10

System must allow the deletion of users

TC-324

RO-348 20

System should allow administrators to setup notifications

TC-325

# 7. Assigning the Requirements & Tasks

Now that we have planned which requirements (user stories) and tasks are planned for each sprint, we can assign tasks to the appropriate developer(s). The process you follow will depend on your methodology (e.g. in Scrum the developers pick the tasks, but in Extreme Programming the product manager usually assigns tasks).

To assign the tasks, go to the main Navigation Bar and click on Artifact > Tasks to display the main tasks list page:

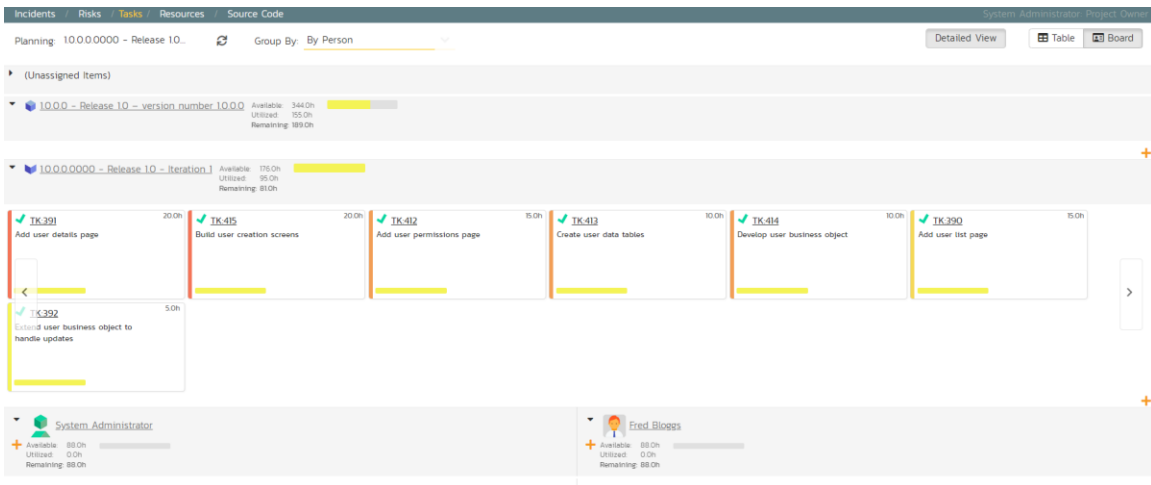
Name	Progress	Type	Status	Priority	Owner	Release	Est. Effort	ID	Edit
✓ Add user_list.page	Not Started	Development	Not Started	3 - Medium		10.0.0.0000	15.0h	TK-390	Edit
✓ Add user_details.page	Not Started	Development	Not Started	1 - Critical		10.0.0.0000	20.0h	TK-391	Edit
✓ Extend user_business.object.to.handle.updates	Not Started	Development	Not Started	4 - Low		10.0.0.0000	5.0h	TK-392	Edit
✓ Create user_administration_home.page	Not Started	Development	Not Started	2 - High		10.0.0.0000	15.0h	TK-398	Edit
✓ Add user_settings_for_notifications_to_database	Not Started	Development	Not Started	4 - Low		10.0.0.0000	10.0h	TK-403	Edit
✓ Extend user_business.object.to.handle.deletes	Not Started	Development	Not Started	3 - Medium		10.0.0.0000	5.0h	TK-409	Edit
✓ Update user_list.page.to.add.delete.functionality	Not Started	Development	Not Started	3 - Medium		10.0.0.0000	10.0h	TK-410	Edit
✓ Create user_notifications_administration.page	Not Started	Development	Not Started	1 - Critical		10.0.0.0000	20.0h	TK-411	Edit
✓ Add user_permissions.page	Not Started	Development	Not Started	2 - High		10.0.0.0000	15.0h	TK-412	Edit
✓ Create user_data.tables	Not Started	Development	Not Started	2 - High		10.0.0.0000	10.0h	TK-413	Edit
✓ Develop user_business.object	Not Started	Development	Not Started	2 - High		10.0.0.0000	10.0h	TK-414	Edit
✓ Build user_creation.screens	Not Started	Development	Not Started	1 - Critical		10.0.0.0000	20.0h	TK-415	Edit

Click on the 'Board' option on the top-right of the screen to change to the Kanban board view:

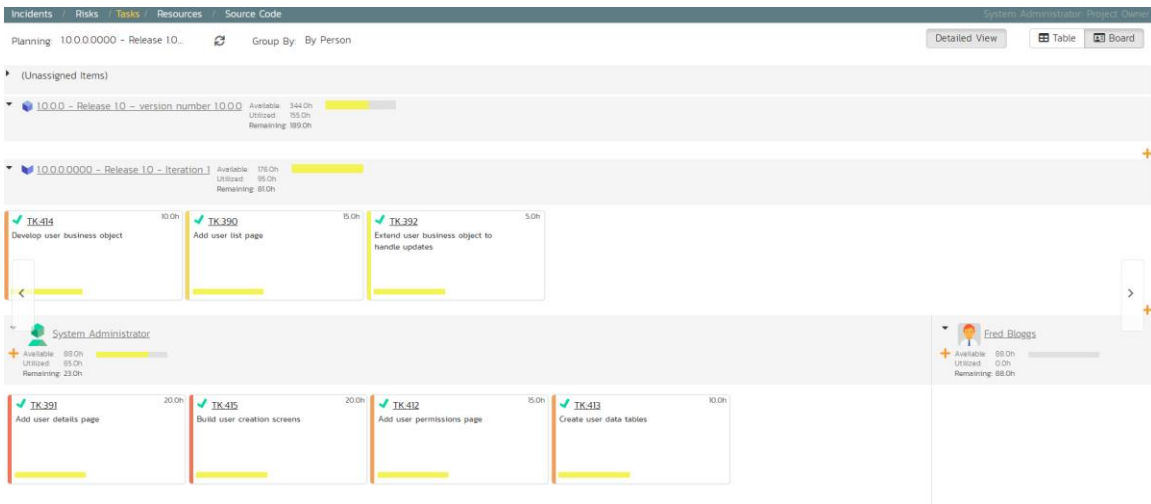
Not Started	In Progress	Completed	Blocked	Deferred	Rejected	Duplicate	Under Review
TK-391 Add user details page 20.0h							
TK-411 Create user notifications administration page 20.0h							
TK-415 Build user creation screens 20.0h							
TK-398 Create user administration home page 15.0h							

You can see at a glance which tasks are in each status (in this case, they are all marked as 'Not Started'). To see the distribution of tasks by person for a specific sprint, change the release selection to 'Release 1.0 Iteration 1', and the 'Group By' dropdown to 'By Person':





For our sample product, we have two product members listed (included ourselves). As an example, select the first four tasks (which are all priority = 1 - Critical) and drag them to your user's section:



Now you can clearly see the four tasks that have been assigned to your user. To simulate how this would appear to a developer, click on the main SpiraPlan icon (in the top-left) to display your user's "My Page" dashboard:

My Page System Administrator

All Products Current Product

Product Name	Group	Creation Date
Library Information System (Sample)	Sample Program One	22-Sep-2018
US clone - Elise	Sample Program One	20-Feb-2019
Sample Barabones Product	Sample Program One	22-Sep-2018
Sample Empty Product	Sample Program Two	22-Sep-2018
simon testing	Default Program	20-Feb-2019

Name	Product	Importance	Status
------	---------	------------	--------

Name	Product	Due Date	Status
------	---------	----------	--------

Name	Product	Status	Last Executed
------	---------	--------	---------------

Name	Product	Type	Priority	Last Updated
------	---------	------	----------	--------------

Quick Launch

Create incident in: Sample Empty Product

Name	Department	Online	Operations
------	------------	--------	------------

Name	Product	Type	Exposure	Review Date
------	---------	------	----------	-------------

Name	Product	Type	Priority	Date Opened
------	---------	------	----------	-------------

Name	Product	Progress	Priority	Due Date
✓ Add user details page	Sample Empty Produc...		1 - Critical	6-Mar-2019
✓ Build user creation screens	Sample Empty Produc...		1 - Critical	6-Mar-2019
✓ Add user permissions page	Sample Empty Produc...		2 - High	6-Mar-2019
✓ Create user data tables	Sample Empty Produc...		2 - High	6-Mar-2019

This page lists all the development tasks that have been assigned to your user. Click on the task "Create user data tables" to display the task details page:

Incidents Risks Tasks Task Details Resources Source Code

Task [TK-413] Status: Not Started Operations Progress: (0%)

Overview Associations Attachments History

Releases	Properties	Dates and Times
Release / Sprint: 1.0.0.0.0000 - Release 10 - (2/20/2019 - 3/6/2019)	Priority: 2 - High Type: Development Requirement: System must allow entry of users Component: -	Creation Date: 2/20/2019 146:07 PM Last Updated: 2/20/2019 350:15 PM Start Date: 2/20/2019 End Date: 3/6/2019 Projected Effort (h): 10.0h Est Effort (h): 10.00

People

Creator: System Administrator  
Owner: System Administrator

Detailed Information

This task has been estimated at 10.0 hours and is currently not started. The next step is to start working on the assigned task and report back progress. As an example:

1. click the workflow 'Operations' and chose 'Start Task'.

Task [TK:340] Status: Not Started Operations Progress: (0%)

2. Then under 'Dates and Times' enter an 'Actual Effort' of 3.0 hours, and a 'Remaining Effort' of 5.0 hours.
3. In the 'Comments' section below, add a comment: "Added initial set of data tables",
4. Click 'Save' at the top of the page.

The progress indicator will reflect the changes and the new comment will have been added.

Save Refresh + New Delete Tools Email Subscribe

Root

## Create user data tables

Task [TK:413] Status: In Progress Operations Progress: (50%)

Successfully Saved Changes to Task

Overview Associations Attachments History

Releases	Properties	Dates and Times
Release / Sprint: 10.0.0.0000 - Release 10 - ... (2/20/2019 - 3/6/2019)	Priority: 2 - High Type: Development Requirement: System must allow entry of users Component: -	Creation Date: 2/20/2019 1:46:07 PM Last Updated: 2/20/2019 4:07:39 PM Start Date: 2/20/2019 End Date: 3/6/2019 Projected Effort (h): 8.0h Est. Effort (h): 10.00 Actual Effort (h): 3.00 Remaining Effort (h): 5.00
People		
Creator: System Administrator Owner: System Administrator		

Detailed Information

Now click on the other three assigned tasks, start them, and specify the following:

Requirement / Task	Est. Estimate	Actual Effort	Remaining Effort
Create user data tables	10.0h	3.0h	5.0h
Develop user business object	10.0h	2.0h	7.5h
Build user creation screens	20.0h	3.0h	18.0h
Extend user business object to handle updates	5.0h	0.5h	4.0h

After updating the assigned tasks, the 'My Page' dashboard will show all these changes:

My Assigned Incidents

Name	Product	Type	Priority	Date Opened

My Assigned Tasks

Name	Product	Progress	Priority	Due Date
✓ Add user details page	Sample: Empty Produc...	<div style="width: 100%; background-color: yellow;"></div>	1 - Critical	6-Mar-2019
✓ Build user creation screens	Sample: Empty Produc...	<div style="width: 10%; background-color: green;"></div>	1 - Critical	6-Mar-2019
✓ Add user permissions page	Sample: Empty Produc...	<div style="width: 100%; background-color: yellow;"></div>	2 - High	6-Mar-2019
✓ Create user data tables	Sample: Empty Produc...	<div style="width: 50%; background-color: green;"></div>	2 - High	6-Mar-2019

Similarly, for the product manager, On the main Navigation Bar, clicking on Artifacts > Requirements to display the requirements list will show the task progress as it impacts the various requirements:

Sample Empty Product ▾ Requirements ▾ Reporting 🔍

Requirements Planning Board / Releases Documents System Administrator Project Overview

Quick Filter (No filters available) + Insert X Delete Indent Outdent Refresh Show Level Filter Edit Tools Show/Hide columns

Displaying 7 out of 7 requirement(s) for this product

Releases --- All Release..

Charts

■ Passed ■ Failed  
■ Blocked ■ Caution  
■ Not Run  
■ Not Covered

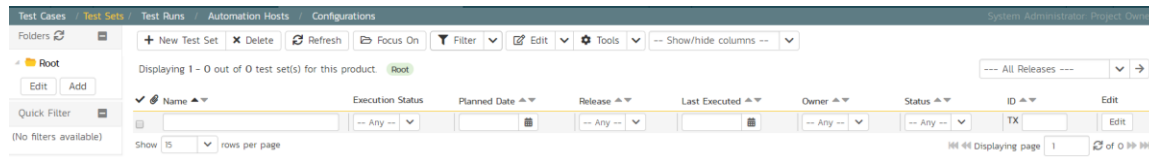
Name	Test Coverage	Progress	Importance	Status	Release	Task Effort	Type	Estimate	ID	Edit
Functional Requirements	Not Covered	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	1 - Critical	In Progress		155.0h	Package	65	RQ345	Edit
Module 1	Not Covered	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	1 - Critical	In Progress		110.0h	Package	45	RQ346	Edit
System must allow entry of users	Not Covered	<div style="width: 100%; height: 10px; background-color: green;"></div>	1 - Critical	In Progress	10.0.0.0000	40.0h	User Story	15	RQ347	Edit
System must allow the modification of users	Not Covered	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	2 - High	In Progress	10.0.0.0000	55.0h	User Story	20	RQ348	Edit
System must allow the deletion of users	Not Covered	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	3 - Medium	Planned	10.0.0.0001	15.0h	User Story	10	RQ349	Edit
Module 2	Not Covered	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	2 - High	Planned		45.0h	Package	20	RQ350	Edit
System should allow administrators to setup notifications	Not Covered	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	2 - High	Planned	10.0.0.0001	45.0h	User Story	20	RQ351	Edit

Show 15 rows per page III 41 Displaying page 1 of 1 III III

# 8. Scheduling the Testing Activities

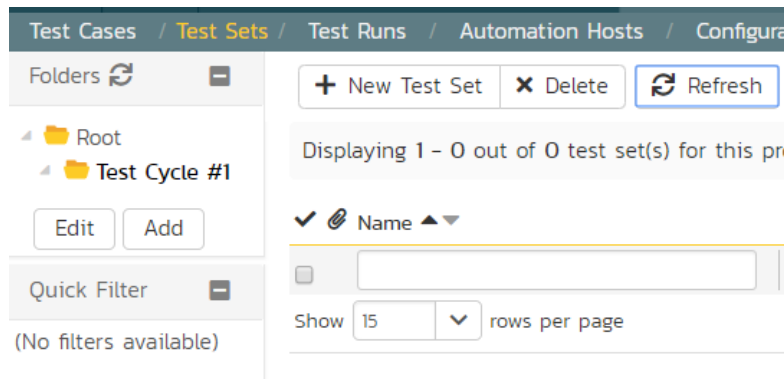
Now that we have created our test plan for each release and sprint, we need to schedule the test cases for execution by our testers. As an example, we'll create a single test set (also known as a test suite) that contains a list of test cases to be executed by a specific tester.

On the main Navigation Bar, click on Artifacts >Test Sets menu option to display the product's test set list page:



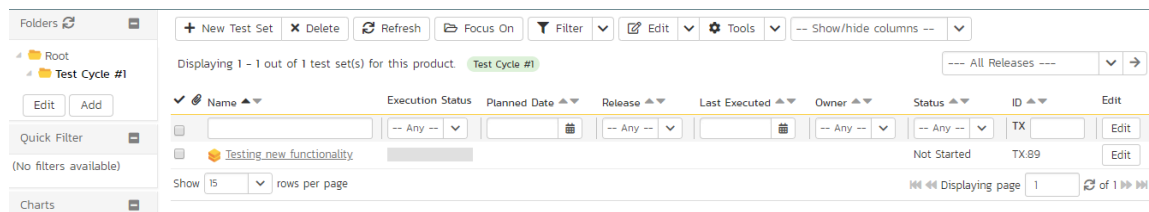
At first, the test set list will be empty and the 'Folders' tree on the left will only show 'Root'.

1. Click the 'Add' button beneath the folder tree
2. Enter the new folder name 'Test Cycle #1'
3. Click the 'Add' button.



4. Click on the folder you just made
5. Click 'New Test Set' from the toolbar.
6. Enter the name of the new test set 'Testing new functionality'
7. Click 'Save'

You should now have the following test set list:



Click on the hyperlink for the test set to bring up the test set details page:

The screenshot shows a web-based testing interface. On the left, there is a 'Folders' pane with 'Root' and 'Test Cycle #1'. Below it, a 'Test Set List' pane shows 'Testing new functionality'. The main area displays the configuration for 'Test Set [TX:89]' with a status of 'Not Started'. The configuration is divided into three sections: 'People', 'Properties', and 'Dates and Times'. The 'People' section shows 'Owner' as 'None' and 'Creator' as 'System Admin...'. The 'Properties' section shows 'Release' as 'None', 'Type' as 'Manual', 'Automation Host' as 'None', and 'Configuration' as 'None'. The 'Dates and Times' section shows 'Creation Date' as '2/12/2019 4:24:47 PM', 'Last Executed' as '-', 'Last Updated' as '2/12/2019 4:25:54 PM', 'Planned Date' as '-', 'Recurrence' as 'One Time', and 'Schedule on Build' as 'No'. Below these sections is a 'Detailed Information' section with a 'Description' field.

Let's add the appropriate test cases to this set.

1. Click the 'Add' button in the 'Test Cases' section half way down the page to bring up the following panel:

The screenshot shows the 'Test Cases' panel. At the top, there is a search bar with the text 'Filter by name, or search by ID (e.g. TC-4)' and a 'Search' button. Below the search bar, there is a message: '~ No available matches found: ~'. At the bottom of the panel, there is a table with columns: 'Test Case Name', 'Owner', 'Priority', 'Est. Dur.', 'Act. Dur.', 'Last Executed', 'Type', 'Execution Status', 'ID', and 'Edit'. The table is currently empty. There are also buttons for '+ Add', 'x Remove', 'Refresh', 'Edit Parameters', 'Show/Hide columns', 'Execute Tests', and 'Est. Dur. / Act. Dur.'.

2. Locate 'Root' drop down menu under 'Test Cases' section.
3. Choose the 'Functional Tests' folder and the test cases in that folder will be displayed:

The screenshot shows the 'Test Cases' panel with the 'Current Product' dropdown set to 'Functional Tests'. The search bar contains the same text as before. Below the search bar, there is a list of test cases with columns: 'ID', 'Name', and 'Product'. The list contains four test cases:

ID	Name	Product
TC-219	Test ability to add new users	Sample: Empty Product
TC-224	Test ability to delete existing users	Sample: Empty Product
TC-223	Test ability to edit existing users	Sample: Empty Product
TC-225	Test ability to edit notifications	Sample: Empty Product

At the bottom of the panel, there are buttons for '+ Add', 'x Remove', 'Refresh', 'Edit Parameters', 'Show/Hide columns', 'Execute Tests', and 'Est. Dur. / Act. Dur.'.

4. Select the following test cases and click the 'Save' button:
  1. Test ability to add new users
  2. Test ability to edit existing users

You should now have the following displayed:

The screenshot shows the configuration page for a test set named "Testing New Functionality". The status is "Not Started". The page is divided into several sections:

- People:** Owner is set to "System Administrator".
- Properties:** Release is "-- None --", Type is "Manual", Automation Host is "-- None --", and Configuration is "-- None --".
- Dates and Times:** Creation Date is 2/20/2019 4:19:43 PM, Last Executed is "-", Last Updated is 2/20/2019 4:20:22 PM, Planned Date is empty, Recurrence is "-- One Time --", and Schedule on Build is "No".
- Test Cases:** A table lists two test cases:
 

Test Case Name	Owner	Priority	Est. Dur.	Act. Dur.	Last Executed	Type	Execution Status	ID	Edit
Test ability to add new users						Functional	Not Run	TC219	Edit
Test ability to edit existing users						Functional	Not Run	TC223	Edit

Next, let's assign this test set to a specific release and to a particular tester. To do that, choose the following values for the following fields and click 'Save':

- Owner = System Administrator (your user)
- Release = Release 1.0 - Iteration 1
- Planned Date = (Today's Date).

You have now scheduled this test set to be executed by your user by the end of today against the first iteration of release 1.0:

The screenshot shows the configuration page after saving changes. A message "Successfully Saved Changes to Test Set" is displayed at the top. The configuration is updated as follows:

- People:** Owner and Creator are both set to "System Administrator".
- Properties:** Release is "1.0.0.0000 - Release 1.0 - ...", Type is "Manual", Automation Host is "-- None --", and Configuration is "-- None --".
- Dates and Times:** Creation Date is 2/20/2019 4:19:43 PM, Last Executed is "-", Last Updated is 2/20/2019 4:31:40 PM, Planned Date is 02/20/2019 4:31 PM, Recurrence is "-- One Time --", and Schedule on Build is "No".

# 9. Running Tests and Logging Incidents

Now that you have scheduled the test set, if you go to the 'My Page' by clicking on the SpiraPlan logo in the top-left, you'll see your newly assigned test set down on the left:

My Page > System Administrator / My Timecard / Administration

### My Page System Administrator

#### My Products

Product Name	Group	Creation Date
Library Information System (Sample)	Sample Program One	22-Sep-2018
LIS clone - Elise	Sample Program One	20-Feb-2019
Sample: Barebones Product	Sample Program One	22-Sep-2018
Sample: Empty Product	Sample Program Two	22-Sep-2018
simon testing	Default Program	20-Feb-2019

#### My Assigned Requirements

Name	Product	Importance	Status
------	---------	------------	--------

#### My Assigned Test Sets

Name	Product	Due Date	Status
Testing New Functionality_2	Sample: Empty Produc...	20-Feb-2019	Not Started

#### My Assigned Test Cases

Name	Product	Status	Last Executed
------	---------	--------	---------------

#### My Detected Incidents

Name	Product	Type	Priority	Last Updated
------	---------	------	----------	--------------

#### Quick Launch

Create Incident in:

#### My Contacts

Name	Department
------	------------

#### My Assigned Risks

Name	Product
------	---------

#### My Assigned Incidents

Name	Product
------	---------

#### My Assigned Tasks

- ✓ Add user details page
- ✓ Build user creation screens
- ✓ Add user permissions page
- ✓ Create user data tables

Click the 'Execute' button (with the play icon) to the right of this new test set. That will start the test execution wizard:

### Test Execution Wizard

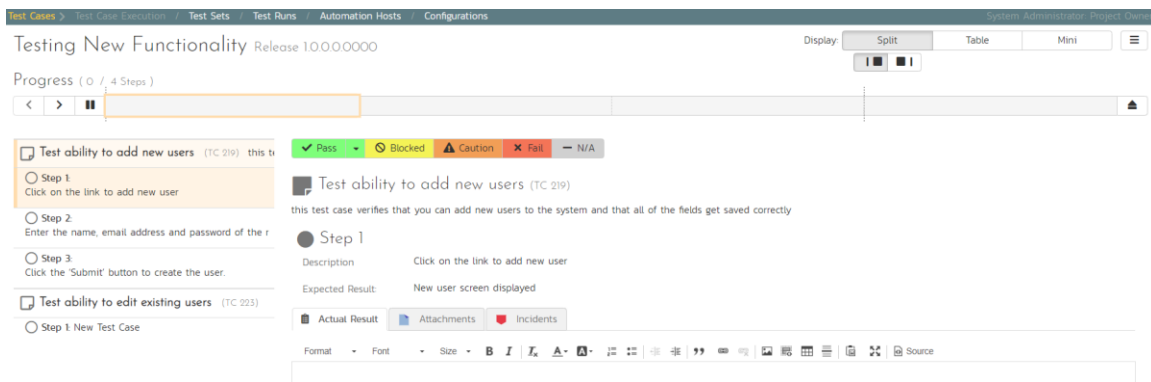
Please Choose the Release and Custom Properties To Execute Against:  
(Note: Any custom properties that are read-only have already been populated from the Test Set.)

Release: 1.0.0.0000 - Relea...

Build: -- None --

On the first screen, the release dropdown list will have been automatically pre-selected to the release specified in the test set. Click 'Next' to move to the first test step in the first test case:

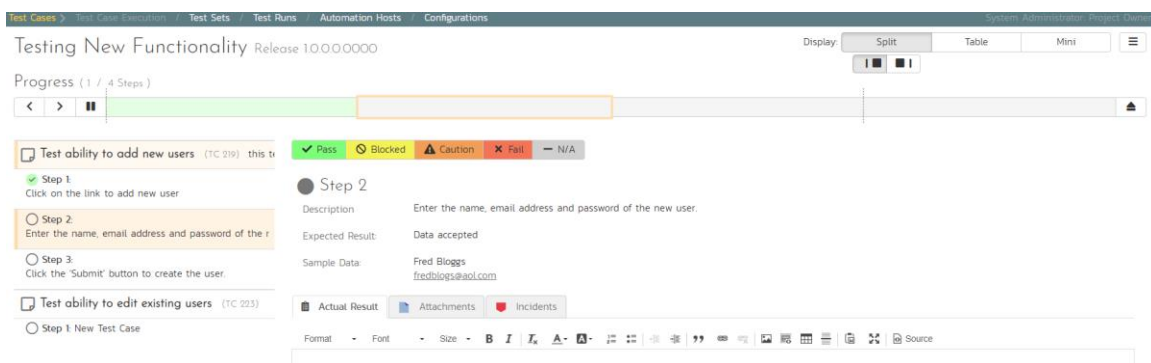




Note that when you first visit this page, you will be shown a quick guided tour of how the page works.

As a tester, you can progress through each of the test steps in each test case in the test set in turn. For each test step you can enter **Pass**, **Fail**, **Blocked**, **Caution**, or **Not Applicable**. If you enter any status other than Pass you need to enter a value for the 'Actual Result'. For a pass status, the Actual Result is optional.

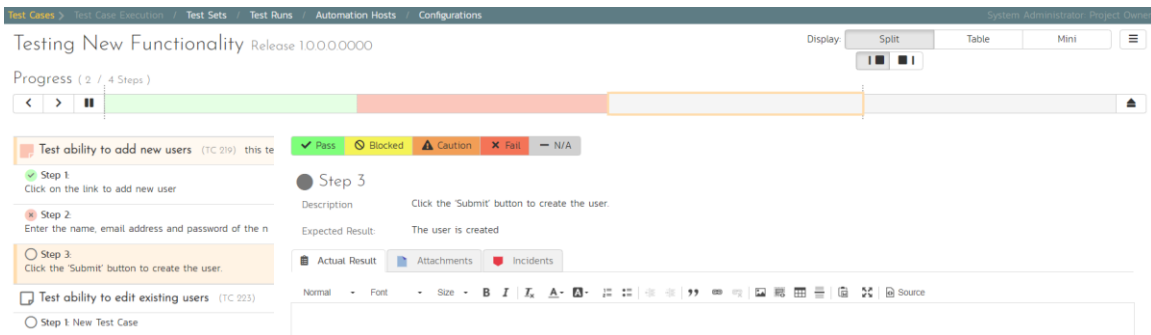
Click the 'Pass' button to pass the first test step. As soon as you do, the test will automatically progress to the second test step:



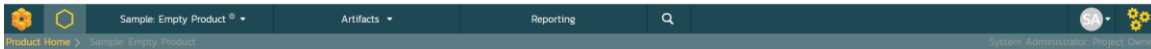
Now for the second test step, enter in the actual result field "Unable to enter the sample data as the fields were disabled". Before clicking the Fail button, we also want to enter in the following fields in the Incident form (accessed by clicking the "Incidents" tab):

- Name = Error displaying user fields
- Type = Bug
- Priority = 2 - High

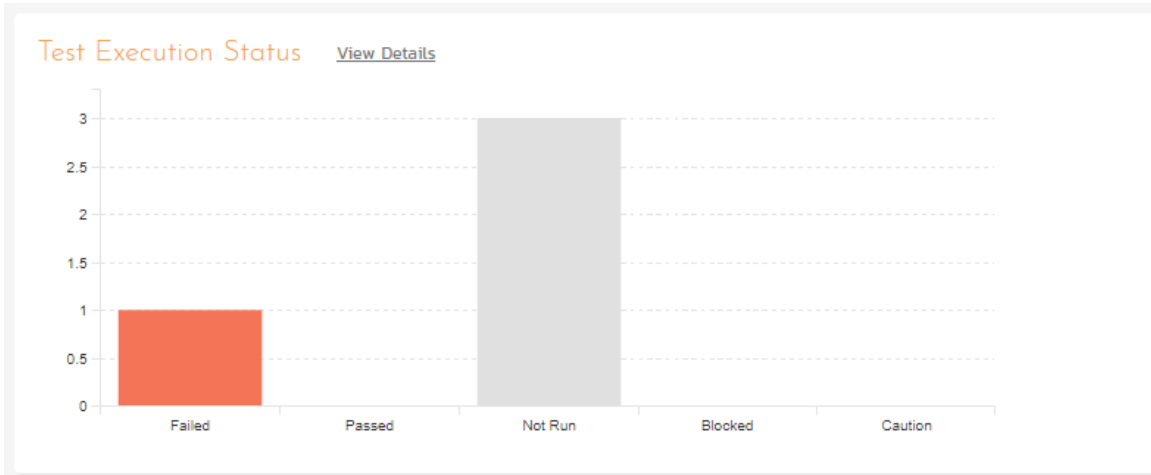
Now click the 'Fail' button and you will have recorded a test failure and a new incident/defect:



Now that we have logged the test failure and the new incident/defect, click on a hexagon on the main navigation bar on the left of “Sample Empty Product” option.



You’ll be taken to the product homepage with the requirements and test case metrics now visible in individual widgets (like the Test Execution Status widget shown below):



If you go to the Artifacts > Test Sets page, you also see the status of our test set:

Name	Execution Status	Planned Date	Release	Last Executed	Owner	Status	ID
Testing New Functionality	In Progress	20-Feb-2019	10.0.0.0000	20-Feb-2019	System Administrator	In Progress	TX-82

If you go to the Artifacts > Requirements page, you’ll see the different requirements’ test coverage and the status of the tests associated with each requirement:

g Board / Releases / Documents

Displaying 7 out of 7 requirement(s) for this product.

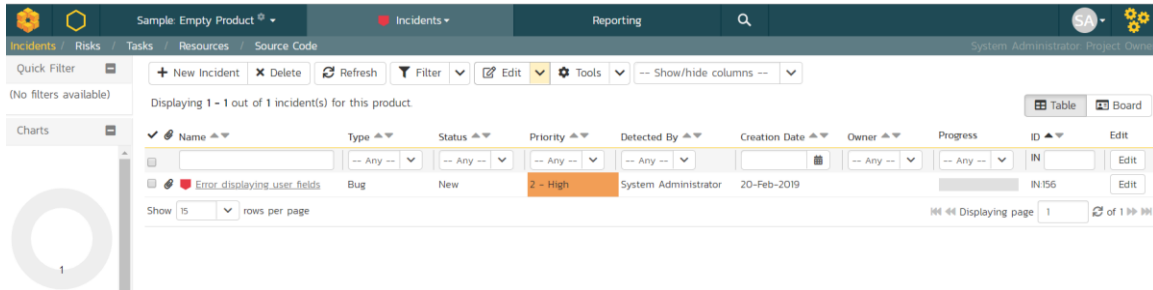
<input checked="" type="checkbox"/> Name	Test Coverage	Progress	Importance	Status
<input type="checkbox"/> <input type="text" value=""/>	-- Any --	-- Any --	-- Any --	-- Any --
<input type="checkbox"/> Functional Requirements	<div style="width: 100%; height: 10px; background-color: red;"></div>	<div style="width: 50%; height: 10px; background-color: yellow;"></div>	1 - Critical	In Progress
<input type="checkbox"/> Module 1	<div style="width: 100%; height: 10px; background-color: red;"></div>	<div style="width: 50%; height: 10px; background-color: yellow;"></div>	1 - Critical	In Progress
<input type="checkbox"/> System must allow entry of users	<div style="width: 100%; height: 10px; background-color: red;"></div>	<div style="width: 25%; height: 10px; background-color: yellow;"></div>	2 - High	In Progress
<input type="checkbox"/> System must allow the modification of users	<div style="width: 100%; height: 10px; background-color: gray;"></div>	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	2 - High	Planned
<input type="checkbox"/> System must allow the deletion of users	<div style="width: 100%; height: 10px; background-color: gray;"></div>	<div style="width: 100%; height: 10px; background-color: gray;"></div>	3 - Medium	Planned
<input type="checkbox"/> Module 2	<div style="width: 100%; height: 10px; background-color: gray;"></div>	<div style="width: 100%; height: 10px; background-color: gray;"></div>	1 - Critical	Planned
<input type="checkbox"/> System should allow administrators to setup notifica	<div style="width: 100%; height: 10px; background-color: gray;"></div>	<div style="width: 100%; height: 10px; background-color: gray;"></div>	3 - Medium	Planned

Show  rows per page

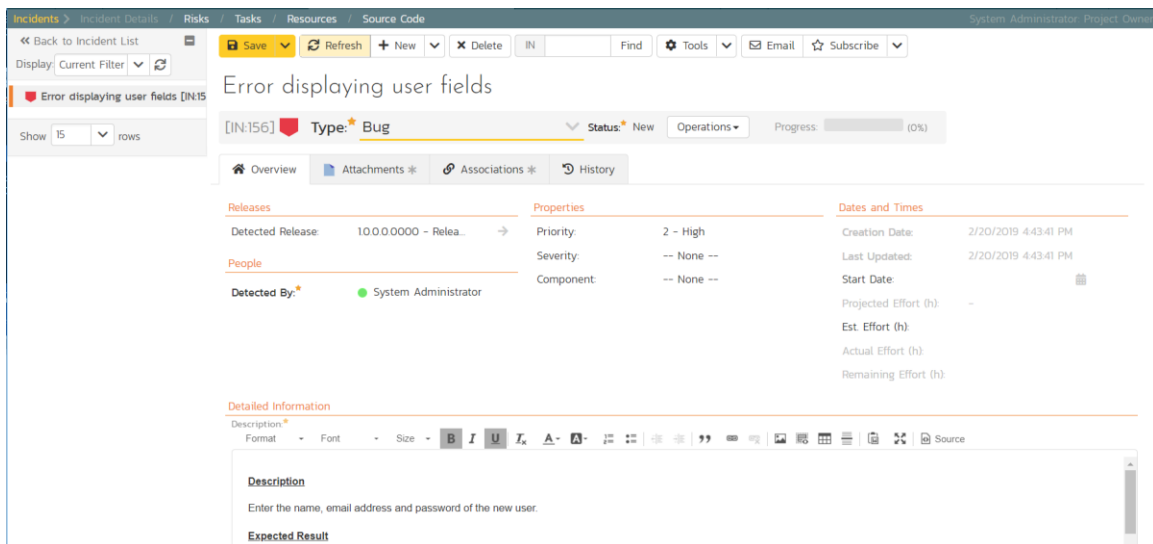
The next step in the process is to triage the logged defect and assign it to a developer to be fixed.

# 10. Triaging Issues and Defects

Now that a new incident has been logged, the next step in the process is to review the incident and assign it to a developer to be fixed. First, click on the Artifacts > Incidents menu item. This will display the incident list page for the product. You can also view the same list of incidents in a Kanban board view.



In either view, click on the hyperlink for the new incident "Error displaying user fields". This will display the incident details page:




1. In the 'Operations' dropdown menu underneath the incident name on the top of the page, select 'Assign Incident' option. This will switch the status of the incident from New > Assigned.
2. Location the 'People' section and set the 'Owner' field to System Administrator (your user)
3. Add a new comment in the 'Comments' section at the bottom of the page. Type "Assigning this to you to fix. Issue was found during testing."
4. Click the 'Save' button in the top toolbar.

The incident will be assigned to your user for fixing.



To see what a developer would see in real life, go back to the "My Page" by clicking on the orange SpiraPlan icon in the top-left of the main Navigation Bar on the top of the screen:

### My Assigned Incidents

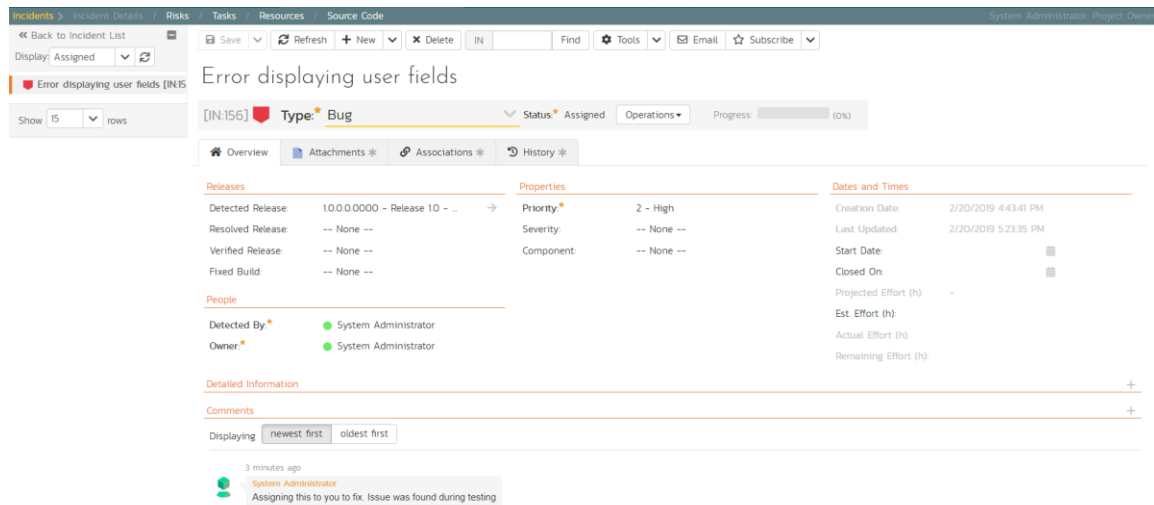
Name	Product	Type	Priority	Date Opened
 <a href="#">Error displaying user fields</a>	Sample: Empty Produc...	Bug	2 - High	20-Feb-2019

### My Assigned Tasks

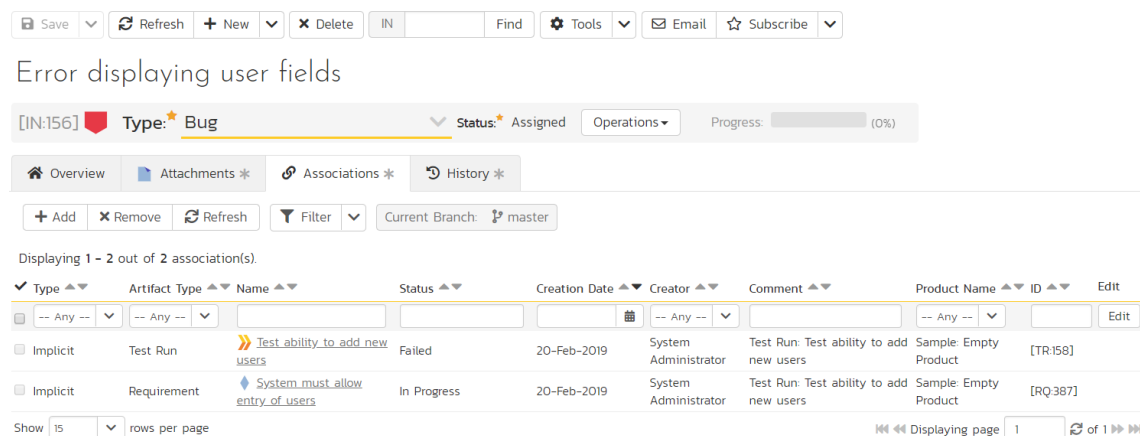
Name	Product	Progress	Priority	Due Date
 <a href="#">Add user details page</a>	Sample: Empty Produc...	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	1 - Critical	6-Mar-2019
 <a href="#">Build user creation screens</a>	Sample: Empty Produc...	<div style="width: 25%; height: 10px; background-color: green;"></div>	1 - Critical	6-Mar-2019

You can see that you've been assigned an incident under the "My Assigned Incidents" widget (on the right-hand side). Now click on the hyperlink for the incident to bring up the incident details page:



The screenshot shows the incident details page for "Error displaying user fields" (ID: [IN:156]). The status is "Assigned" and the priority is "2 - High". The incident was detected by the System Administrator on 2/20/2019 at 4:43:41 PM. The page includes tabs for Overview, Attachments, Associations, and History. The Overview tab is active, showing release information, properties, and a comment from the System Administrator: "Assigning this to you to fix. Issue was found during testing".

The status is 'Assigned' and the comment from the product manager is clearly visible. To help you reproduce the issue, you can click on the "Associations" tab to display the test run and requirements associated with this incident:



The screenshot shows the "Associations" tab for the incident. It displays a table of associations with columns for Type, Artifact Type, Name, Status, Creation Date, Creator, Comment, Product Name, and ID. Two associations are shown: a failed test run and an in-progress requirement.

Type	Artifact Type	Name	Status	Creation Date	Creator	Comment	Product Name	ID	Edit
Implicit	Test Run	Test ability to add new users	Failed	20-Feb-2019	System Administrator	Test Run: Test ability to add new users	Sample: Empty Product	[TR:158]	Edit
Implicit	Requirement	System must allow entry of users	In Progress	20-Feb-2019	System Administrator	Test Run: Test ability to add new users	Sample: Empty Product	[RQ:387]	Edit

If you click on the test run hyperlink "Test ability to add new users", you will see the detailed information about the test execution that resulted in the bug being logged:

The screenshot shows a web application interface for test runs. The main heading is "Test Run [TR:158]" with an execution status of "Failed". Below this, there are tabs for Overview, Attachments, Incidents, Tasks, and History. The Overview tab is active, showing details for the test run, including the test set "Testing New Functionality", test case "Test ability to add new users", and tester "System Administrator". A table of test steps is displayed below:

Step	Test Step Description	Expected Result	Sample Data	Test # / Step #	Actual Result	Execution Status
1	Click on the link to add new user	New user screen displayed		TC219 / JS360		Passed
2	Enter the name, email address and password of the new user.	Data accepted	Fred Bloggs fredbloggs@aad.com	TC219 / JS367	Unable to enter the sample data as the fields were disabled	Failed
3	Click the 'Submit' button to create the user.	The user is created		TC219 / JS368		Not Run

This allows the developer to retrace the steps taken by the tester and attempt to reproduce the issue. We are going to assume we can reproduce and fix the issue so we can go right ahead and resolve the incident.

1. Make your way back to the incident details screen: Artifacts> Incidents > Error displaying user fields' Hyperlink.
2. Click on the workflow 'Operations' drop-down menu and select 'Resolve Incident'.

The screenshot shows an incident details page for "Error displaying user fields" (ID: IN:156). The incident type is "Bug" and the status is "Assigned". The "Operations" dropdown menu is open, showing options: "Duplicate Incident", "Resolve Incident", and "Unable to Reproduce". The "Resolve Incident" option is selected. Below the incident details, there are tabs for Overview, Attachments, Associations, and History. The Overview tab is active, showing release information and properties.

Releases	Properties	Dates and Times
Detected Release: 10.0.0.0000 - Release 1.0 - ...	Priority: 2 - High	Creation Date
Resolved Release: -- None --	Severity: -- None --	Last Update
Verified Release: -- None --	Component: -- None --	Start Date
Fixed Build: -- None --		Closed On:

3. Fill in the following fields
  1. Resolved Release = Release 1.0 - Iteration 2
  2. In 'Comments' section enter a new comment = "Fixed the incident."
4. Click 'Save' on the main toolbar

The screenshot shows a web-based incident management system. At the top, there are navigation tabs for 'Incidents', 'Risks', 'Tasks', 'Resources', and 'Source Code'. The current incident is titled 'Error displaying user fields' with ID '[IN:156]' and type 'Bug'. The status is 'Resolved' and the progress is at 0%. The interface is divided into several sections: 'Releases', 'Properties', 'Dates and Times', 'People', 'Detailed Information', and 'Comments'. A comment from 'System Administrator' states 'Fixed the incident' 2 minutes ago.

Releases		Properties		Dates and Times	
Detected Release:	1.0.0.0.0001 - Release 10 - L. →	Priority:	2 - High	Creation Date:	2/20/2019 4:43:41 PM
Resolved Release:	-- None --	Severity:	-- None --	Last Updated:	2/20/2019 5:43:50 PM
Verified Release:	-- None --	Component:	-- None --	Start Date:	
Fixed Build:	-- None --			Closed On:	02/20/2019 5:40
People		Projected Effort (h):	-		
Detected By:	System Administrator	Est. Effort (h):			
Owner:	System Administrator	Actual Effort (h):			
Detailed Information		Remaining Effort (h):			
Comments					
Displaying: newest first   oldest first					
2 minutes ago System Administrator Fixed the incident					

The incident will now change from Assigned > Resolved and an email will be sent to the tester letting them know that they need to retest the test case and close the incident.

# 11. Reviewing Your Product

You can check on the overall status of the product by clicking the hexagon on the main navigation bar. This will take you to the product home page. Below is what this home page looks like for a more complete product than we have been working through in this quick start guide.

Note how you can change between several views (the buttons on the right) to show different information based on your role or current needs, or only show data for a particular release (see the dropdown beneath the product name on the left).

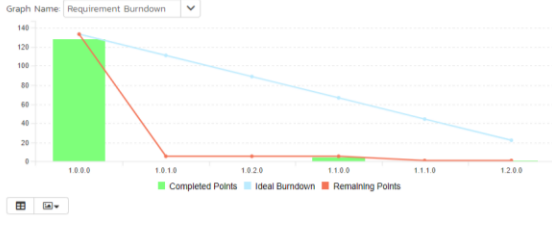
The screenshot displays the 'Library Information System (Sample) PRI' dashboard. At the top, there are navigation tabs for 'General', 'Development', and 'Testing'. The main content area is divided into several sections:

- Product Overview:** Provides basic information about the product, including its program, website, and owner.
- Activity Stream:** A list of recent activities, such as 'Fred Bloggs modified Risk' and 'Fred Bloggs added Risk Mitigation'.
- Shared Searches:** A list of searches created by users, such as 'Critical Not-Covered Requirements'.
- Requirements Summary:** A table showing the status of requirements across different levels (Critical, High, Medium, Low, None).
- Requirements Coverage:** A bar chart showing the number of requirements in various states: Passed, Failed, Blocked, Caution, Not Run, and Not Covered.
- Release Task Progress:** A table showing the progress of tasks for different releases, including estimated and projected hours.
- Top Open Issues:** A table listing the most significant issues, including their descriptions, priorities, owners, and dates.
- Risk Summary:** A matrix showing the distribution of risks based on impact and probability.
- Top Open Risks:** A table listing the most critical risks, including their descriptions, exposure, types, owners, and review dates.
- Test Execution Status:** A bar chart showing the results of test runs, including the number of tests that passed, failed, or were blocked.
- Release Test Summary:** A table showing the test results for various releases, including the number of tests and their execution status.



110.0 - Library System Release 11	21	86.9h	86.6h	<div style="width: 100%; height: 10px; background-color: green;"></div>
111.0 - Library System Release 11 SP1	0	0.9h	0.9h	No Tasks
120.0 - Library System Release 12	3	10.0h	9.5h	<div style="width: 100%; height: 10px; background-color: green;"></div>

### Requirement Graphs



### Late Finishing Tasks

Name	Owner	Progress	End Date
✓ Develop new edition entry screen	Fred Bloggs	<div style="width: 80%; height: 10px; background-color: red;"></div>	7-Oct-2018
✓ Create edition object insert method	Fred Bloggs	<div style="width: 70%; height: 10px; background-color: red;"></div>	8-Oct-2018
✓ Create author object delete method	Fred Bloggs	<div style="width: 60%; height: 10px; background-color: red;"></div>	8-Oct-2018
✓ Write author object delete query	Fred Bloggs	<div style="width: 40%; height: 10px; background-color: red;"></div>	9-Oct-2018

### Incident Summary

View Details

Displaying for Incident Type: -- All --

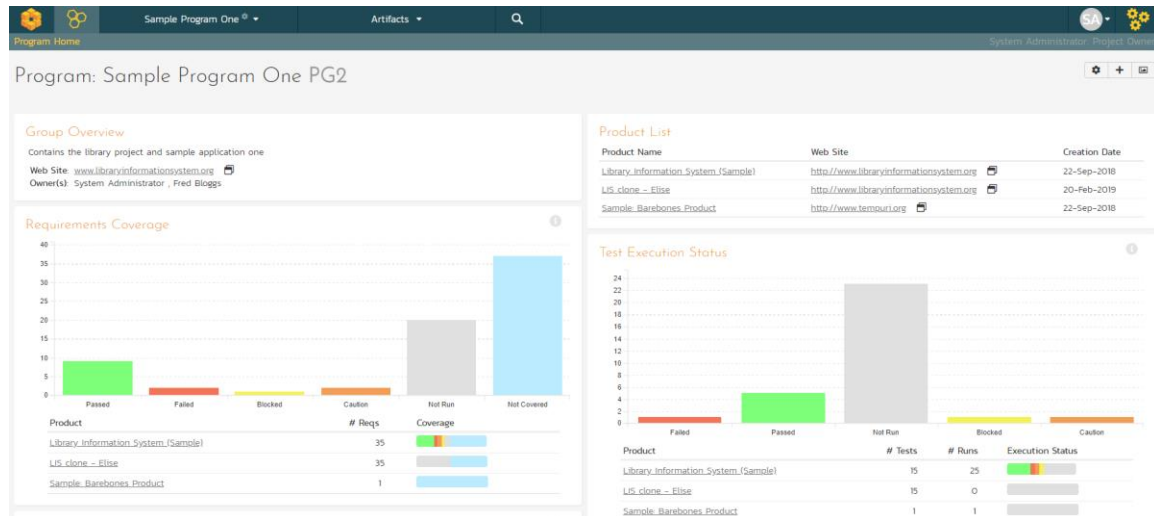
Status	1 - Critical	2 - High	3 - Medium	4 - Low	(None)	TOTAL
Assigned	8	5	5	2		15
Closed	3	2	3	5		13
Duplicate	2		1		3	6
New					3	3
Not Reproducible		1				1
Open	3	5	2	2	5	15
Reopen						0
Resolved	2	2		2		6
<b>TOTAL</b>	<b>14</b>	<b>14</b>	<b>11</b>	<b>11</b>	<b>10</b>	<b>60</b>



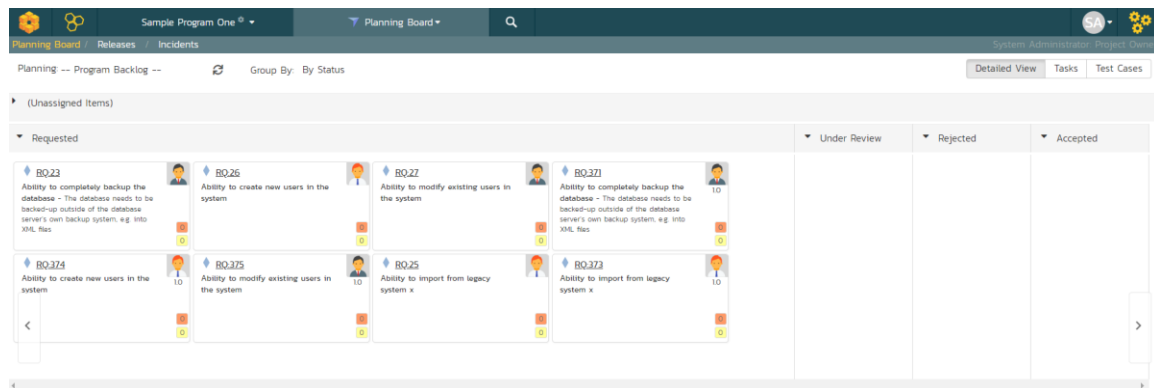
# 12. Reviewing A Program

In addition to having dashboards that let you monitor the performance of your product, SpiraPlan has several views available at the program level. These let your group products together into a common program and report on them as a whole.

To see this in action, click on the "Sample Program One" link in the main navigation bar.



You can click on the Artifacts > **Planning** Board tab to display the Program Planning Board (which is similar to the one we used previously for products, except that it works across multiple products):



There are additional program views that let you see the **Releases** and **Incidents** at a program level. Click Artifacts > Releases:

Sample Program One

Releases

System Administrator - Project Owner

Refresh Show Level Filter Show/Hide columns

Displaying 15 out of 41 release(s) for this program.

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit
Library Information System (Sample)											
Library System Release 1	10.0.0			29-Sep-2018	27-Nov-2018	216.0h	94.3h	Major Release	Completed	RL.1	
Library System Release 1.SP1	10.1.0			11-Oct-2018	28-Oct-2018	176.0h	0.3h	Minor Release	Completed	RL.2	
Sprint_001	10.1.0.0001	No Tests	No Tasks	11-Oct-2018	18-Oct-2018	80.0h		Sprint	Completed	RL.11	
Sprint_002	10.1.0.0002	No Tests	No Tasks	19-Oct-2018	22-Oct-2018	48.0h		Sprint	Completed	RL.12	
Sprint_003	10.1.0.0003	No Tests	No Tasks	23-Oct-2018	28-Oct-2018	64.0h		Sprint	Completed	RL.13	
Library System Release 1.SP2	10.2.0			30-Oct-2018	27-Nov-2018	352.0h		Minor Release	Completed	RL.3	
Sprint_001	10.2.0.0001	No Tests	No Tasks	30-Oct-2018	7-Nov-2018	112.0h		Sprint	Completed	RL.14	
Sprint_002	10.2.0.0002	No Tests	No Tasks	8-Nov-2018	17-Nov-2018	112.0h		Sprint	Completed	RL.15	
Sprint_003	10.2.0.0003	No Tests	No Tasks	18-Nov-2018	27-Nov-2018	128.0h		Sprint	Completed	RL.16	
Sprint_001	10.0.0.0001	No Tests		29-Sep-2018	2-Oct-2018	96.0h	32.0h	Sprint	Completed	RL.9	
Sprint_002	10.0.0.0002	No Tests		3-Oct-2018	6-Oct-2018	24.0h	32.0h	Sprint	Completed	RL.8	
Sprint_003	10.0.0.0003	No Tests		7-Oct-2018	10-Oct-2018	72.0h	30.0h	Sprint	Completed	RL.10	
Library System Release 1.1	11.0.0			28-Nov-2018	13-Feb-2019	168.0h	86.9h	Major Release	In Progress	RL.4	
Library System Release 1.1.SP1	11.1.0			15-Dec-2018	13-Jan-2019	336.0h	0.9h	Minor Release	In Progress	RL.5	

Show 15 rows per page

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*Congratulations! You have now completed the software development and testing lifecycle using SpiraPlan. For more information about any of the features, please refer to the SpiraPlan User Manual.*

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