



SpiraTest® | 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.

SpiraTest® is a complete quality assurance and test management system with integrated release scheduling and defect tracking. SpiraTest manages your requirements, test cases and defects/bugs with requirements traceability and real-time coverage analysis.

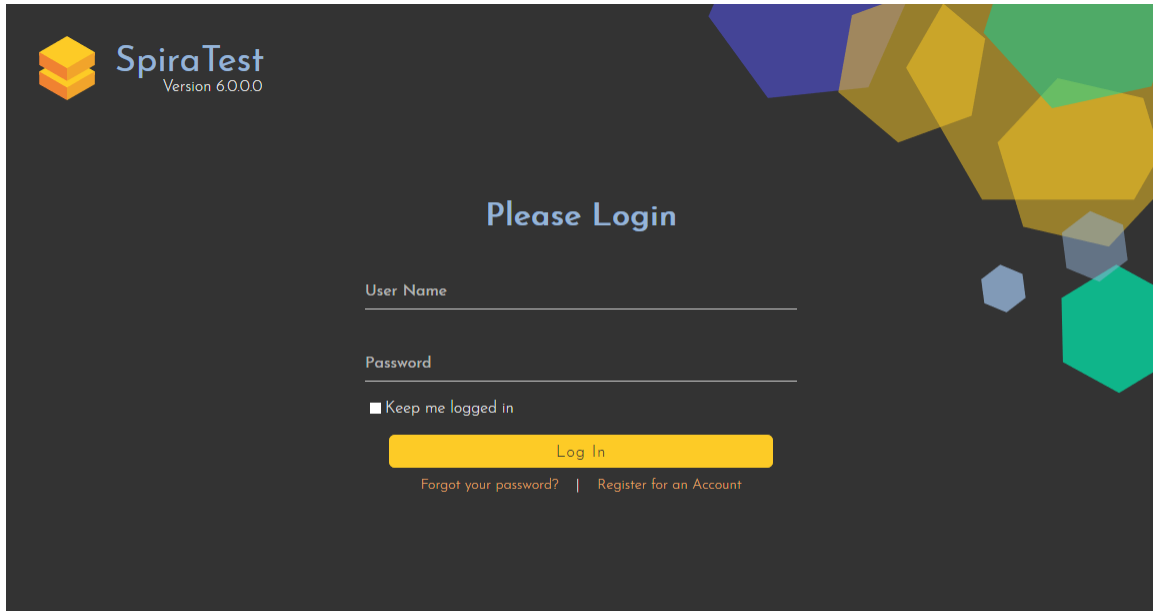
This guide provides a quick step-by-step tutorial for creating a sample SpiraTest product, adding some requirements and releases, building the test plan, scheduling the tests, executing the tests and logging defects, and finally triaging and resolving the bugs/issues raised.

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

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

# 1. Logging in and Selecting a Product

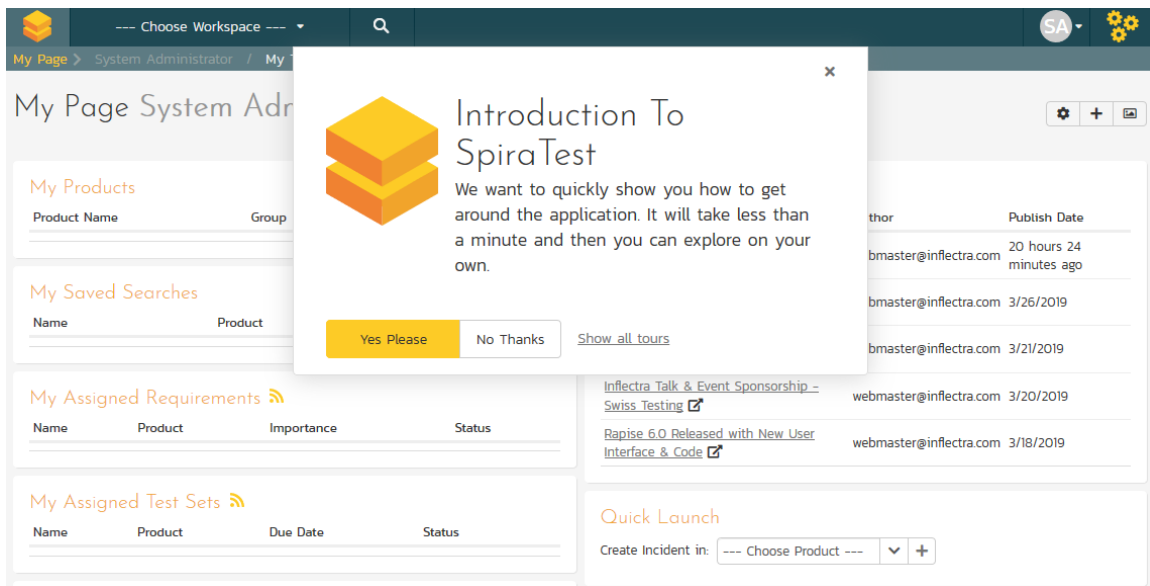
Once you have installed a self-hosted trial or signed up for a hosted trial of SpiraTest, you should see the following login screen in your web browser:



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).



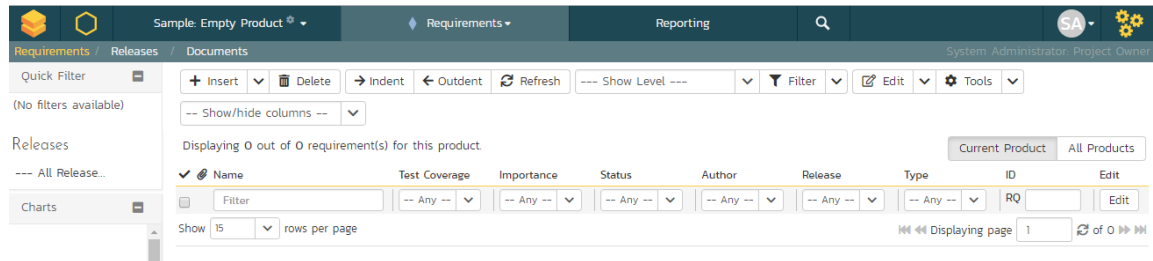
The My Page looks pretty empty right now. This is normal.

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:

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:



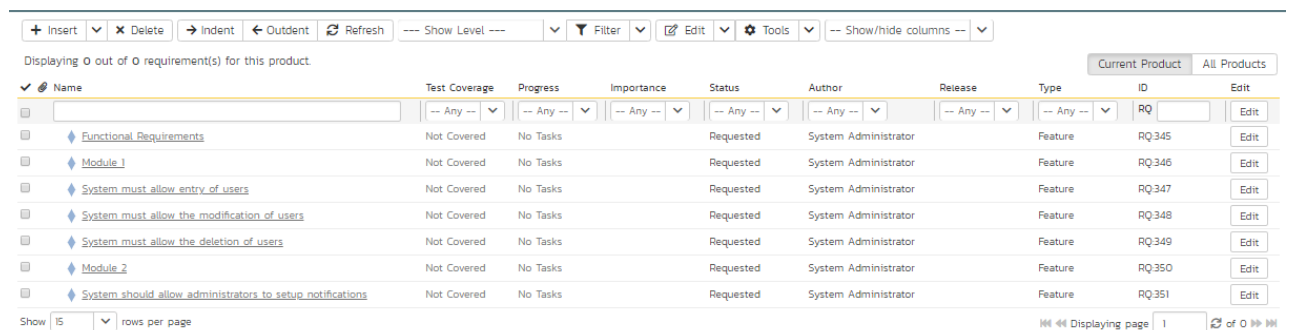
The terminology in SpiraTest is designed to be methodology agnostic. The table below shows how the terms used in SpiraTest relate to some common methodologies:

SpiraTest	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

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

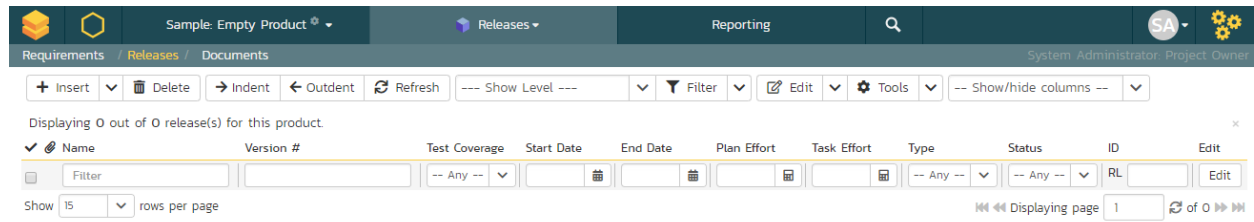
Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	Estimate
Functional_Requirements	Not Covered	No Tasks	1 - Critical	Requested	System Administrator		Package	6.5
Module 1	Not Covered	No Tasks	1 - Critical	Requested	System Administrator		Package	4.5
System must allow entry of users	Not 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

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

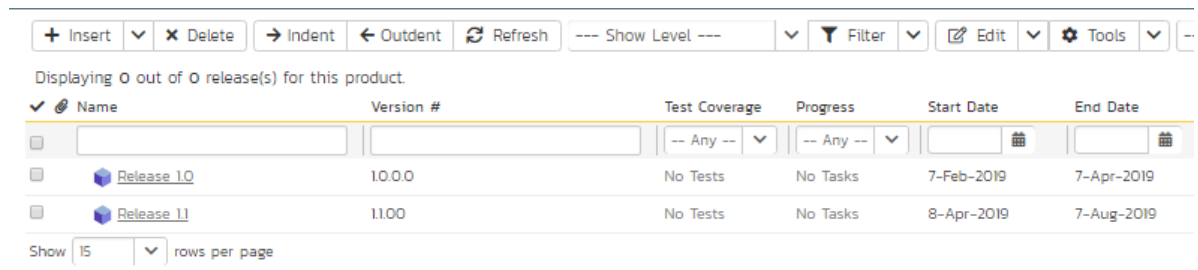
On the main navigation bar, click out of 'Requirements' and select 'Releases' menu option to display the product's release list page:



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

--- Show Level ---
 


 --- Show/Hide columns ---

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 1.0 – version number 1.0.0.0	1.0.0.0	No Tests	No Tasks	20-Feb-2019	20-Apr-2019	344 Oh		Major Release	Planned	RL320	Edit
Release 1.0 – Iteration 1	1.0.0.0000	No Tests	No Tasks	20-Feb-2019	6-Mar-2019	88 Oh		Sprint	Planned	RL327	Edit
Release 1.0 – Iteration 2	1.0.0.0001	No Tests	No Tasks	7-Mar-2019	21-Mar-2019	88 Oh		Sprint	Planned	RL328	Edit
Release 1.0 – Iteration 3	1.0.0.0002	No Tests	No Tasks	22-Feb-2019	5-Apr-2019	248 Oh		Sprint	Planned	RL329	Edit
Release 1.1 – version number 1.1.0.0	1.1.0.0	No Tests	No Tasks	20-Feb-2019	20-Jun-2019	696 Oh		Major Release	Planned	RL321	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

--- Show Level ---
 


 --- Show/Hide columns ---

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 1.0 – version number 1.0.0.0	1.0.0.0	No Tests	No Tasks	20-Feb-2019	20-Apr-2019	344 Oh		1	Planned	RL320	Edit
Release 1.0 – Iteration 1	1.0.0.0000	No Tests	No Tasks	20-Feb-2019	6-Mar-2019	176 Oh		2	Planned	RL327	Edit
Release 1.0 – Iteration 2	1.0.0.0001	No Tests	No Tasks	7-Mar-2019	21-Mar-2019	176 Oh		2	Planned	RL328	Edit
Release 1.0 – Iteration 3	1.0.0.0002	No Tests	No Tasks	22-Mar-2019	5-Apr-2019	176 Oh		2	Planned	RL329	Edit
Release 1.1 – version number 1.1.0.0	1.1.0.0	No Tests	No Tasks	20-Feb-2019	20-Jun-2019	696 Oh		1	Planned	RL321	Edit

Show 15 rows per page Displaying page 1 of 1

Now that we have the releases and sprints scheduled, we now need to assign our previously defined requirements to the different releases.

1. On the main navigation bar, click on Artifacts' drop-down menu and click Requirements to display the requirements list.
2. Click the 'select all' checkbox at the top of the list
3. Click the top 'Edit' button on the main tool bar. That will make all the cells editable.
4. Now choose the release/sprint for each of the lower-level requirements
5. Click 'Save'

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

--- Show Level ---
 


 --- Show/Hide columns ---

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

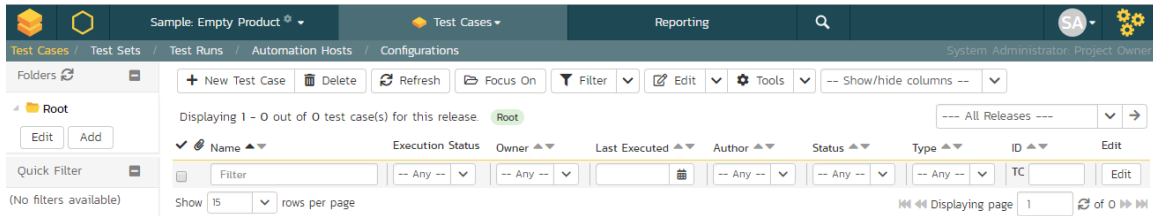
Name	Test Coverage	Importance	Status	Author	Release	Type	ID	Edit
Filter	--- Any ---	--- Any ---	--- Any ---	--- Any ---	--- Any ---	--- Any ---	RQ	Edit
Functional Requirements	Not Covered	1 - Critical	Planned	System Administrator		Package	RQ342	Edit
Module 1	Not Covered	1 - Critical	Planned	System Administrator	1.0.0.0	Package	RQ343	Edit
System must allow entry of users	Not Covered	1 - Critical	Planned	System Administrator	1.0.0.0001	Feature	RQ344	Edit
System must allow the modification of users	Not Covered	3 - Medium	Planned	System Administrator	1.0.0.0001	Feature	RQ345	Edit
System must allow the deletion of users	Not Covered	2 - High	Planned	System Administrator	1.0.0.0020	Feature	RQ346	Edit
Module 2	Not Covered	1 - Critical	Planned	System Administrator	1.0.0.0022	Package	RQ347	Edit
System should allow administrators to setup notifications	Not Covered	2 - High	Planned	System Administrator	1.0.0.0022	Feature	RQ348	Edit

Show 15 rows per page Displaying page 1 of 1

Notice that all the requirements have automatically changed status from 'Requested' to 'Planned', this is because they have been assigned a specific release/iteration.

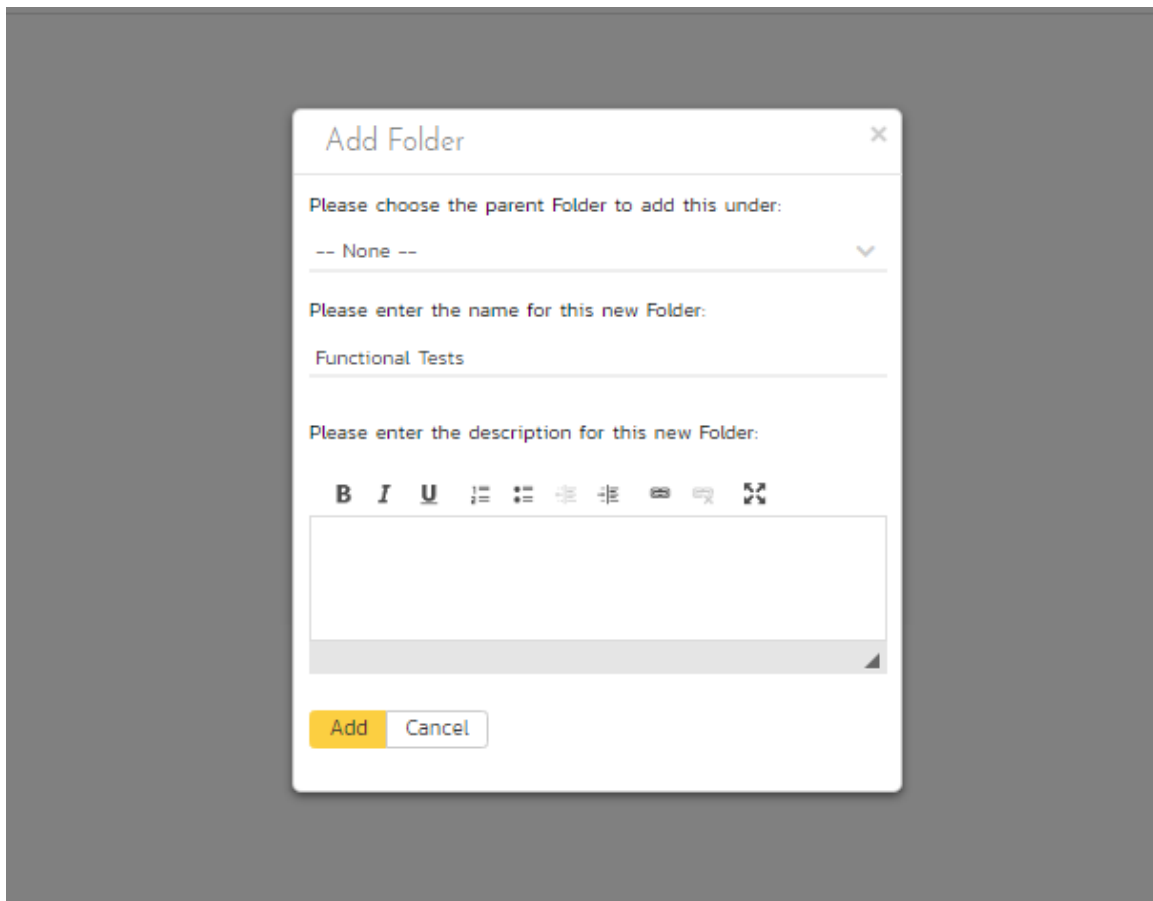
## 4. Build the Test Plan

On the main Navigation bar, click on the Artifacts drop-down menu and select Test Cases menu option to display the product's test case list page:

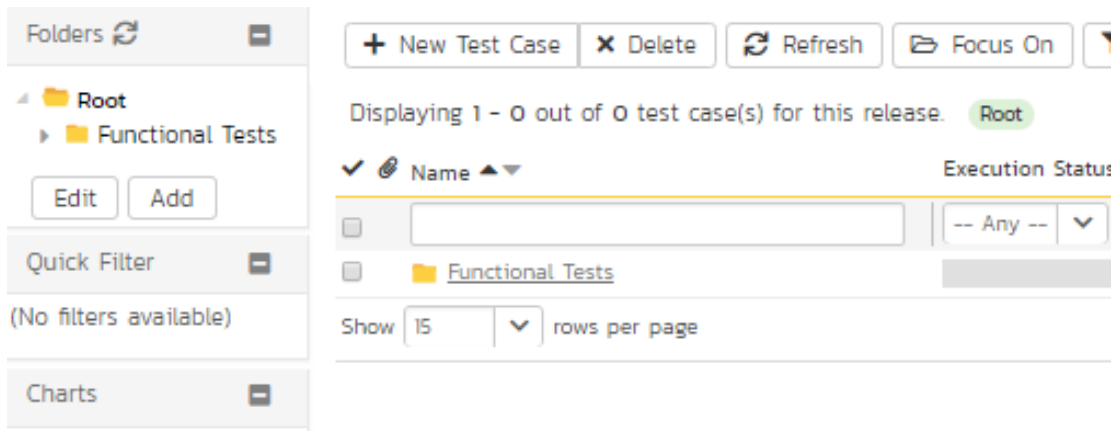


The test case list is empty and the only folder visible in the 'Folders' tree on the left-hand side is 'Root'.

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

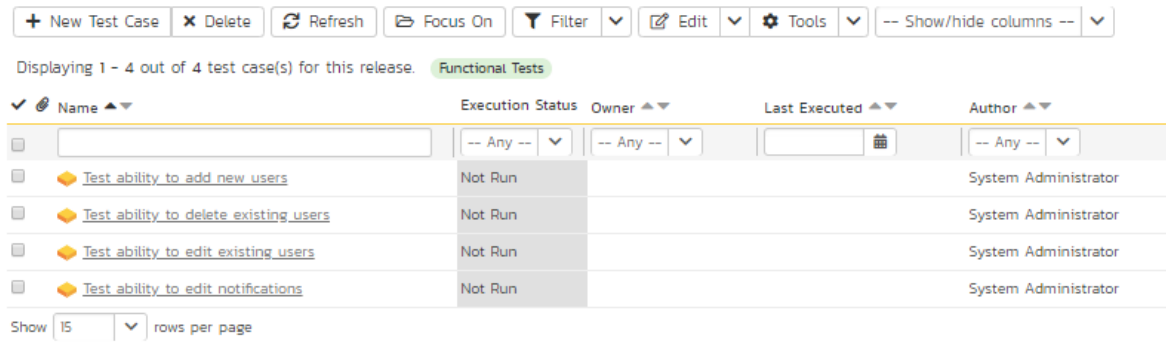


4. You now have a new folder in the 'Folders' tree view. To show it, click 'Refresh'.



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

The screenshot shows a web application interface for managing test cases. On the left, there is a sidebar with a 'Folders' view showing 'Root' and 'Functional Tests'. Below it, a list of test cases is displayed, with 'Test ability to add new users' selected. The main area shows the details for 'Test Case [TC204]' with a status of 'Draft' and 'Execution Status: Not Run'. The 'Detailed Information' section is expanded, showing a 'Description' field and a 'Properties' table.

People	Properties	Dates and Times
Author: System Administrator	Type: Functional	Est. Dur. (h):
Owner: -- None --	Component: -- None --	Creation Date: 2/7/2019 2:42:49 PM
	Priority: -- None --	Last Executed: -
	Suspect?: No	Last Updated: 2/7/2019 2:43:36 PM

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:

The screenshot shows the 'Test Steps' section of the interface. It features a table with columns for 'Step #', 'Description', 'Expected Result', 'Sample Data', 'Execution Status', and 'ID'. A single step is listed with the ID 'TS320' and status 'Not Run'. The table has a toolbar with options like 'Insert Step', 'Refresh', 'Clone', 'Import', 'Delete', and 'Edit Parameters'.

Step #	Description	Expected Result	Sample Data	Execution Status	ID
Step_1	New Test Case	Works as expected.		Not Run	TS320

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:

The screenshot shows the 'Test Steps' section after three steps have been added. The table now contains three rows, each with a unique ID (TS324, TS325, TS326) and a status of 'Not Run'. The 'Sample Data' column for the second step contains the name 'Fred Bloggs' and the email address 'fredblogs@aol.com'.

Step #	Description	Expected Result	Sample Data	Execution Status	ID
Step_1	Click on the link to add new user	New user screen displayed		Not Run	TS324
Step_2	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>	Not Run	TS325
Step_3	Click the 'Submit' button to create the user.	The user is created		Not Run	TS326

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
------	------	--------	------------	--------------

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

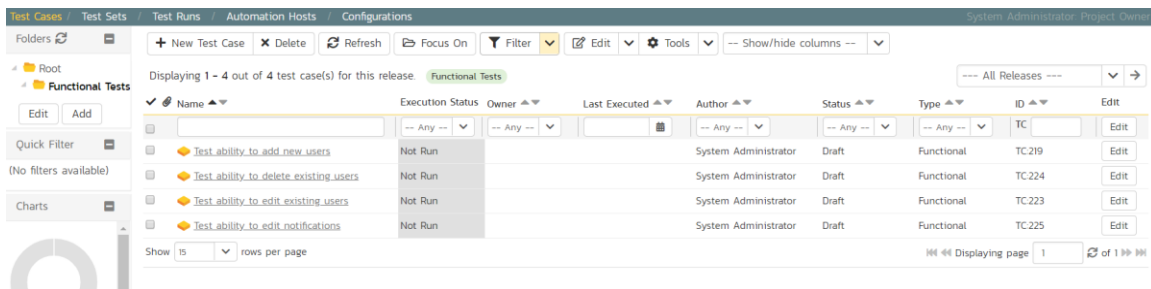
Displaying page 1 of 1

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:

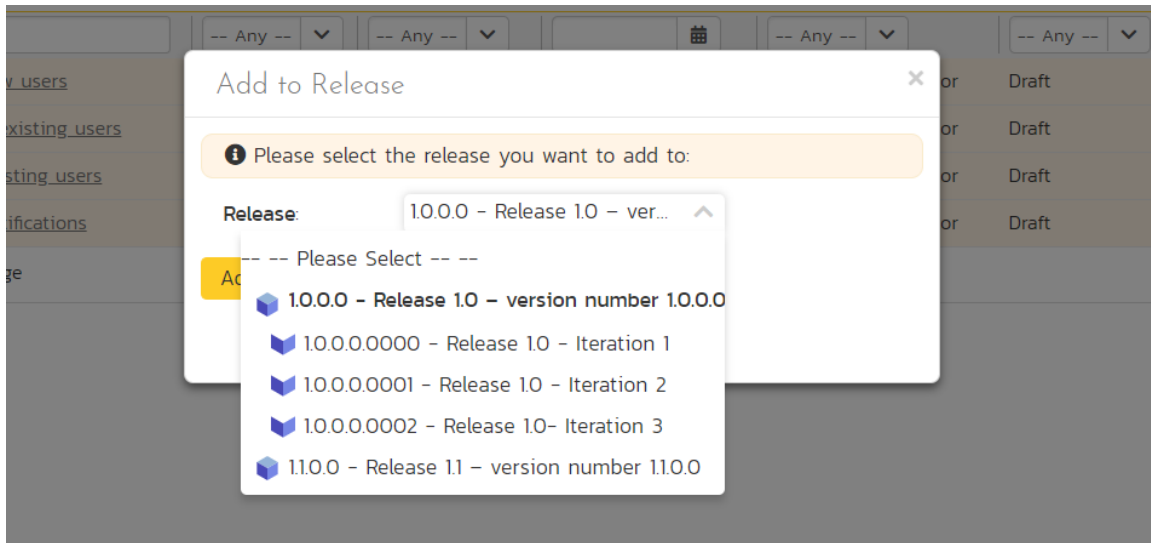
Test Case	Requirement
Test ability to add new users	System must allow entry of users
Test ability to edit existing users	System must allow the modification of users
Test ability to delete existing users	System must allow the deletion of users
Test ability to edit notifications	System should allow administrators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

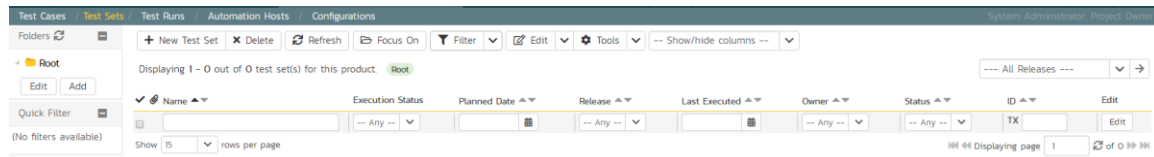
Test Case	Sprint(s)
Test ability to add new users	Release 1.0 - Iteration 1 Release 1.0 - Iteration 2 Release 1.0 - Iteration 3
Test ability to edit existing users	Release 1.0 - Iteration 1 Release 1.0 - Iteration 2 Release 1.0 - Iteration 3
Test ability to delete existing users	Release 1.0 - Iteration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

# 5. Scheduling the Testing Activities

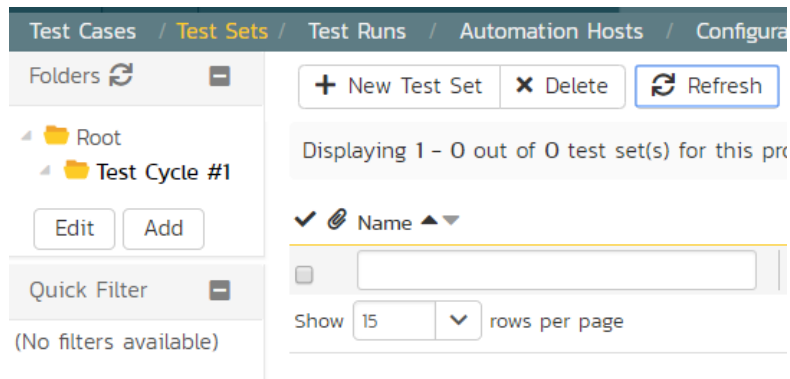
Now that we have created our test plan for each release and sprint, we need to schedule the test cases for execution by our testers. As an example, we'll create a single test set (also known as a test suite) that contains a list of test cases to be executed by a specific tester.

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



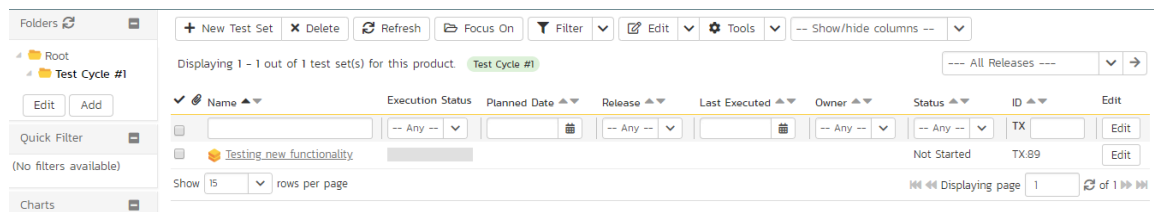
At first, the test set list will be empty and the 'Folders' tree on the left will only show 'Root'.

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 Case 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' search panel. It has 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, it says '~ No available matches found: ~'. There are 'Save' and 'Cancel' buttons. Below the search bar, there are several action buttons: '+ Add', 'x Remove', 'Refresh', 'Edit Parameters', '-- Show/hide columns --', and 'Execute Tests'. At the bottom, there is a table header with columns: 'Test Case Name', 'Owner', 'Priority', 'Est. Dur.', 'Act. Dur.', 'Last Executed', 'Type', 'Execution Status', 'ID', and 'Edit'. The table is currently empty, and it shows '15 rows per page' and 'Displaying page 1 of 0'.

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' search panel with results for 'Functional Tests'. The search bar contains 'Filter by name, or search by ID (e.g. TC-4)'. The results table has columns: 'ID', 'Name', and 'Product'. The table contains five rows of 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

There are 'Save' and 'Cancel' buttons below the table. At the bottom, there are action buttons: '+ Add', 'x Remove', 'Refresh', 'Edit Parameters', '-- Show/hide columns --', and 'Execute Tests'. It also shows 'Est. Dur.' and '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 "System Administrator", Creator is "System Administrator".
- Properties:** Release is "-- None --", Type is "Manual", Automation Host is "-- None --", 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 "--", Recurrence is "-- One Time --", Schedule on Build is "No", Post-Build Delay (s) is "--".
- Test Cases:** A table listing test cases with columns for Name, Owner, Priority, Est. Dur., Act. Dur., Last Executed, Type, Execution Status, ID, and Edit.

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:

### Testing New Functionality

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 is "System Administrator", Creator is "System Administrator".
- Properties:** Release is "1.0.0.0000 - Release 1.0 - ...", Type is "Manual", Automation Host is "-- None --", 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 --", Schedule on Build is "No", Post-Build Delay (s) is "--".

# 6. Running Tests and Logging Incidents

Now that you have scheduled the test set, if you go to the 'My Page' by clicking on the SpiraTest 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
<a href="#">Library Information System (Sample)</a>	<a href="#">Sample Program One</a>	22-Sep-2018
<a href="#">LIS clone - Elise</a>	<a href="#">Sample Program One</a>	20-Feb-2019
<a href="#">Sample: Barebones Product</a>	<a href="#">Sample Program One</a>	22-Sep-2018
<a href="#">Sample: Empty Product</a>	<a href="#">Sample Program Two</a>	22-Sep-2018
<a href="#">simon testing</a>	<a href="#">Default Program</a>	20-Feb-2019

#### My Assigned Requirements

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

#### My Assigned Test Sets

Name	Product	Due Date	Status
<a href="#">Testing New Functionality_2</a>	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:

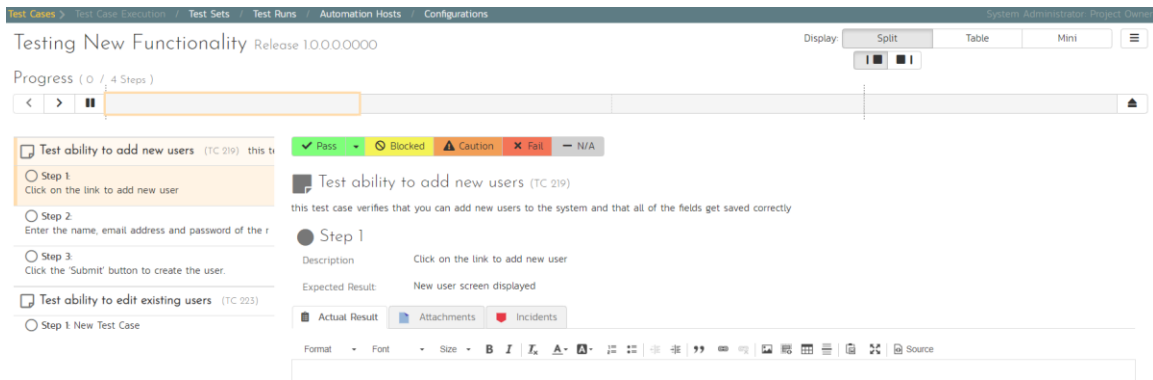
### Test Execution Wizard

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 --

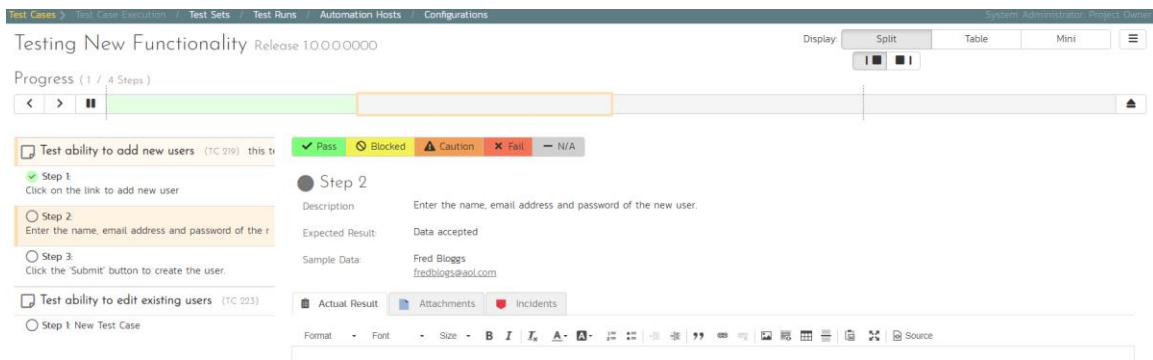
On the first screen, the release dropdown list will have been automatically pre-selected to the release specified in the test set. Click 'Next' to move to the first test step in the first test case:



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

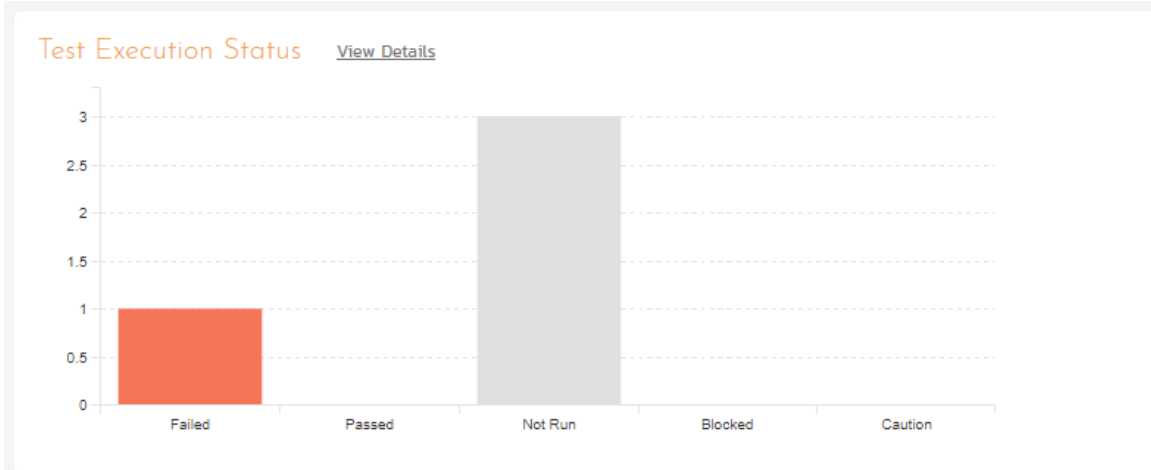
Now click the 'Fail' button and you will have recorded a test failure and a new incident/defect:

The screenshot shows a test execution interface for 'Testing New Functionality Release 10.0.0.0000'. The progress bar indicates 2 out of 4 steps. Step 3 is currently active and has failed. The failure message is 'Click the 'Submit' button to create the user.' The interface includes a legend for test results (Pass, Blocked, Caution, Fail, N/A) and a list of test cases.

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.

The screenshot shows the main navigation bar with the 'Sample Empty Product' option selected. The navigation bar includes icons for home, search, and reporting, and a dropdown menu for 'Sample Empty Product'.

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:

The screenshot shows the Test Sets page with a table of test sets. The table has the following columns: Name, Execution Status, Planned Date, Release, Last Executed, Owner, Status, and ID. The data row is:

Name	Execution Status	Planned Date	Release	Last Executed	Owner	Status	ID
Testing New Functionality	Failed	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.

✓  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

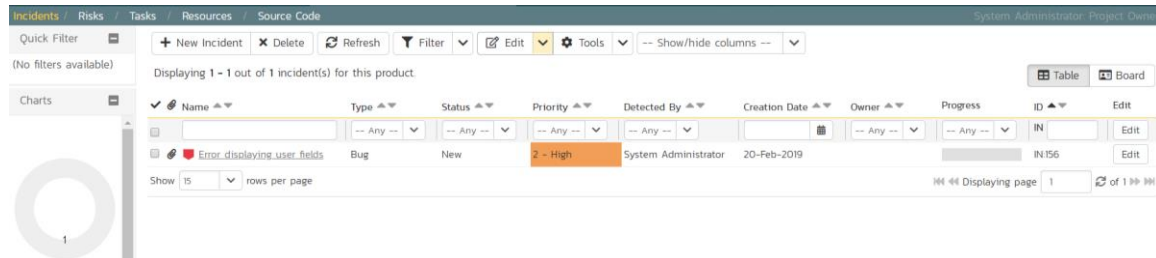
Show  rows per page

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

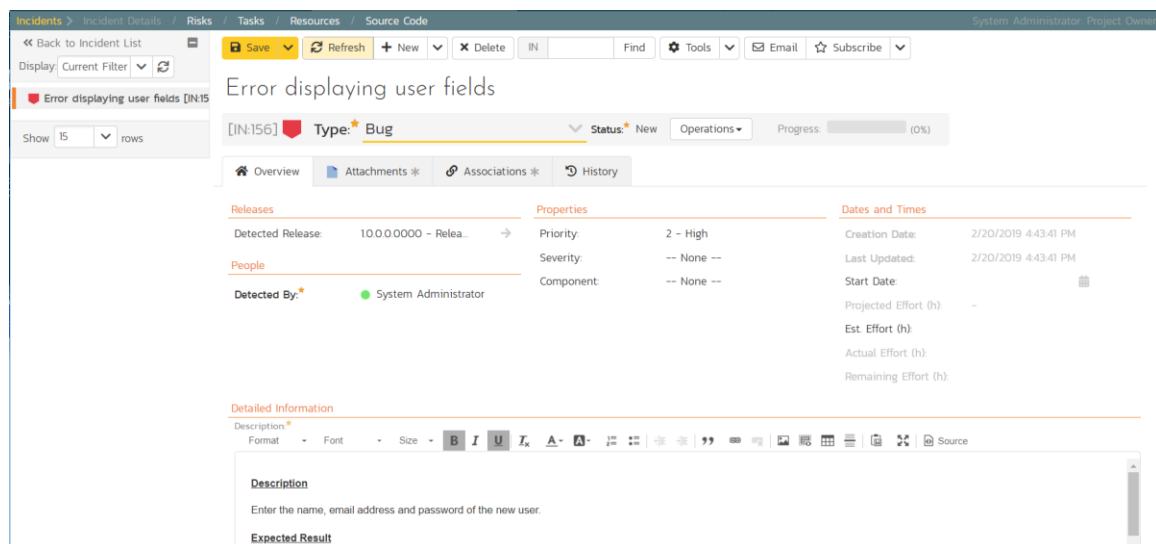


# 7. Triaging Issues and Defects

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 SpiraTest icon in the top-left of the main Navigation Bar on the top of the screen:

### My Assigned Incidents

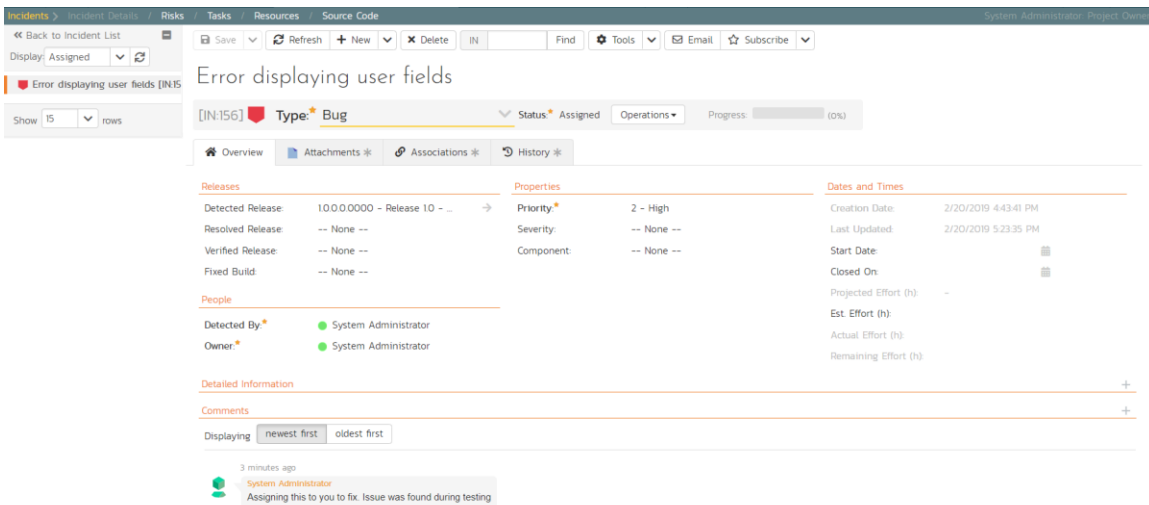
Name	Product	Type	Priority	Date Opened
 <a href="#">Error displaying user fields</a>	Sample: Empty Produc...	Bug	2 - High	20-Feb-2019

### My Assigned Tasks

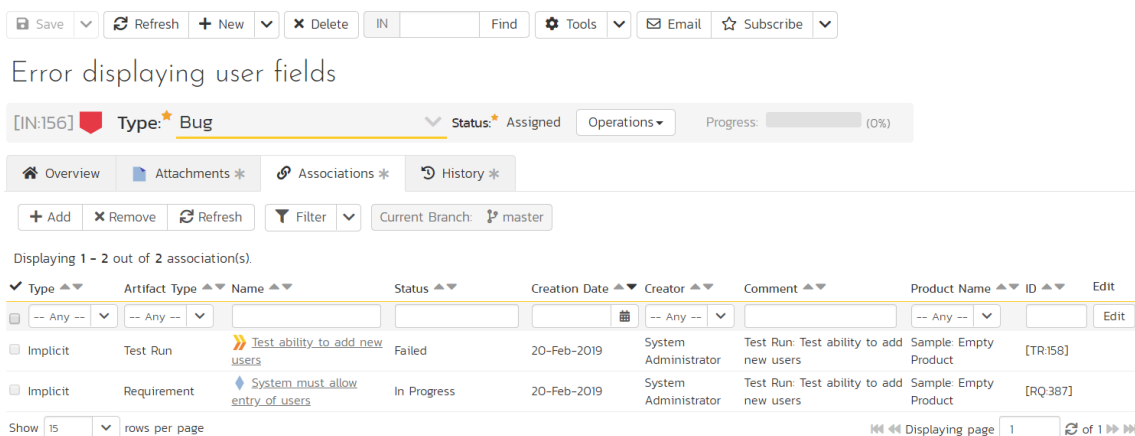
Name	Product	Progress	Priority	Due Date
 <a href="#">Add user details page</a>	Sample: Empty Produc...	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	1 - Critical	6-Mar-2019
 <a href="#">Build user creation screens</a>	Sample: Empty Produc...	<div style="width: 25%; height: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

Type	Artifact Type	Name	Status	Creation Date	Creator	Comment	Product Name	ID
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]
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]

The page also includes navigation controls like "Add", "Remove", "Refresh", "Filter", and "Current Branch: master".

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 displays a test run execution page. At the top, there are navigation tabs for Test Cases, Test Sets, Test Runs, Test Run Details, Automation Hosts, and Configurations. The main title is "Test ability to add new users". Below the title, there is a "Test Run [TR:158]" with an "Execution Status: Failed". A description states: "this test case verifies that you can add new users to the system and that all of the fields get saved correctly". There are tabs for Overview, Attachments, Incidents, Tasks, and History. The page is divided into several sections: Releases (Release #, Build), Properties (Test Set, Test Case #, Test Run Type), Dates and Times (Execution Date, Estimated Duration, Actual Duration), People (Tester Name), and Test Steps. The Test Steps table has columns: Step, Step Description, Expected Result, Sample Data, Test # / Step #, Actual Result, and Execution Status. Step 1 is "Passed", Step 2 is "Failed" with the message "Unable to enter the sample data as the fields were disabled", and Step 3 is "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. At the top, there are navigation tabs for Tasks, Resources, and Source Code. Below that is a toolbar with buttons for Save, Refresh, New, Delete, Find, Tools, Email, and Subscribe. The incident ID is "[IN:156]" and the type is "Bug". The status is "Assigned". There is a "Progress" bar at 0%. Below the incident information, there are tabs for Overview, Attachments, Associations, and History. The main content area is divided into sections: Releases (Detected Release, Resolved Release, Verified Release, Fixed Build), Properties (Priority, Severity, Component), and Dates and Times (Creation Date, Last Update, Start Date, Closed On). An "Operations" dropdown menu is open, showing options: Duplicate Incident, Resolve Incident, and Unable to Reproduce.

3. Fill in the following fields
  - Resolved Release = Release 1.0 - Iteration 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 100%. 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.

# 8. 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 shows the SpiraTest interface for a product named 'Library Information System (Sample) PR1'. The top navigation bar includes 'Product Home', 'Library Information System (Sample)', 'Artifacts', 'Reporting', and user information 'System Administrator - Project Owner'. Below the navigation, there are tabs for 'General', 'Development', and 'Testing'. The main content area is divided into several sections:

- Product Overview:** A summary of the product, including program name, web site, owner, and template.
- Activity Stream:** A list of recent activities, such as 'Fred Bloggs exported Test Case [TC9] - Author management'.
- Top Open Issues:** A table of open issues with columns for Description, Priority, Owned By, and Date Opened.
- Test Execution Status:** A bar chart showing the number of test runs in different states: Failed, Passed, Not Run, Blocked, and Caution. It also includes a 'Daily Run Count' table.
- Shared Searches:** A section for shared search queries.

Description	Priority	Owned By	Date Opened
Cannot install system on Windows 10			5-Jan-2019
Ability to be accessed by Mozilla	2 - High	Joe P Smith	25-Dec-2018
System may require process changes	3 - Medium		22-Dec-2018
Management of children's loans	3 - Medium	Joe P Smith	22-Feb-2019

Daily Run Count:	Count
3/1/2019	1
2/28/2019	3
2/27/2019	2
10/22/2018	3
10/21/2018	1

*Congratulations, you have now completed the testing lifecycle using SpiraTest. For more information about any of the features, please refer to the SpiraTest User Manual.*

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