TestRail Tutorial

1. Create TestRail Account

You get a **free TestRail trial version here**.
Note: When your trial expires, you can use disposable mail services such as https://temp-mail.org/en/, https://tempmailo.com/, https://www.disposablemail.com/ to create a new one.
You can choose the hosted Cloud edition for instant setup, or the Server edition to install on your own computer. You just need to complete the required fields as shown below.
For the Cloud edition, you have the extra step of choosing a web address where you'll access your online instance.

Get Started

14-day free trial. No credit card required.

First Name *

Last Name *

Work Email *

name@company.com

Phone Number

Optional

Company name *

Company name

Country *

Your country

How many users do you expect to access TestRail? *

After signing up, we will instantly create a new TestRail Cloud account for you on our servers.
Already have a TestRail account you want to use? Please contact us.

Web Address *

Choose a name

.testrail.io

Your account will be available under this address.

You'll receive an email with a link to confirm your free trial. Click the link to create your TestRail account. You'll be automatically redirected to your trial TestRail instance once it is ready. This process should take just a few minutes.

Please confirm your account by clicking the link we've just emailed you

✉ Your End: Confirm Email Link	☁ Our End: TestRail Account
Waiting for email confirmation from ~~Intranet.code~~.com	Creating your new TestRail account at ~~caster2~~.testrall.lo
● ● ● ● ● ● ●	● ● ● ● ● ●
Please check your spam folder in case you don't receive our email.	You will automatically be redirected to your TestRail account once it is ready.

Depending on your location, you may need to complete a Data Processing Agreement to confirm compliance with the General Data Protection Regulation (GDPR).
Once you've done that, the setup is complete and you're ready to get started!

2. Getting Started

2.1. The screen that you see below is the TestRail **Dashboard**.
The dashboard shows an overview of your projects, recent activities, and any "todos" assigned to you. Notice the "Welcome to TestRail" notification at the bottom of the screen with suggested steps to get started.

Welcome to TestRail!
Complete the steps below to get familiar with TestRail and set up your first project.

Create a project — Add cases — Start a run — Add results — Invite users — Set up integration

2.2. Click the **Administration** tab. You need to come here to do things like add users and roles, extend your trial subscription, configure custom fields, set up integrations, and more. Click on **Users and Roles**, and you'll see that you have been added as the administrator.
Click the **Roles** tab, and you'll see the predefined roles i.e. Read-only, Tester, Designer, and Lead. Click the pencil icon to view the rights assigned to each role. It's easy to change the default descriptions, create additional roles, add one or more users, assign them to roles, organize them into groups, etc.

Users	Groups	**Roles**

| Role		
Read-only	✏	⊖
Tester	✏	⊖
Designer	✏	⊖
Lead (Default)	✏	

⊕ Add Role

2.3. Use the **Dashboard** tab to return to the Dashboard. This is where you'll manage and track your testing projects. Let's start by creating a project. Click the **Add Project** button to do so.
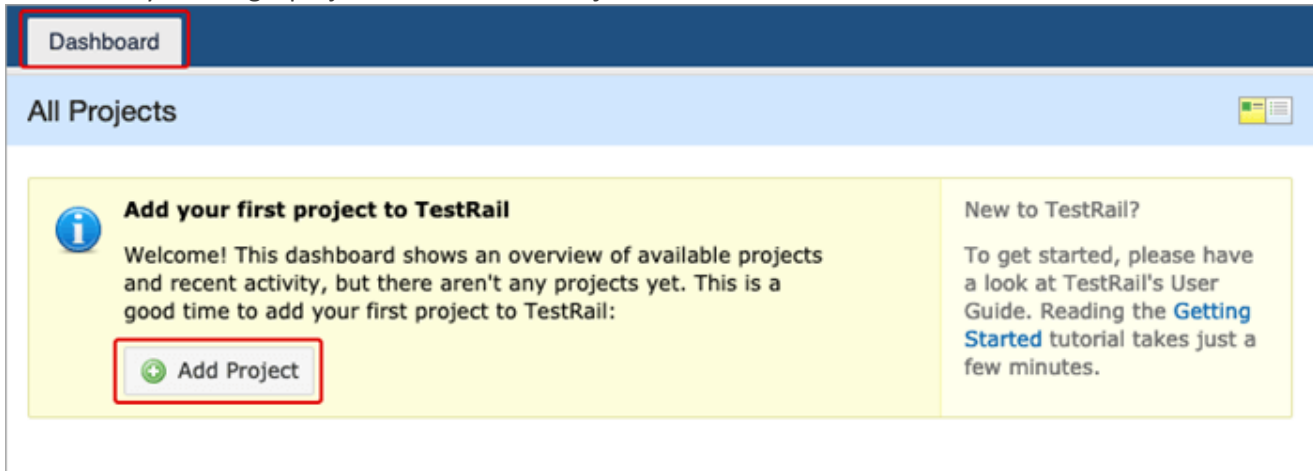
3. Create a Project

3.1. Give your project a name, then choose a storage option, as shown below. For greater flexibility, you should choose the third option: **use multiple test suites to manage cases**.
This allows you to start with a single test suite and then add more test suites in the future if required.
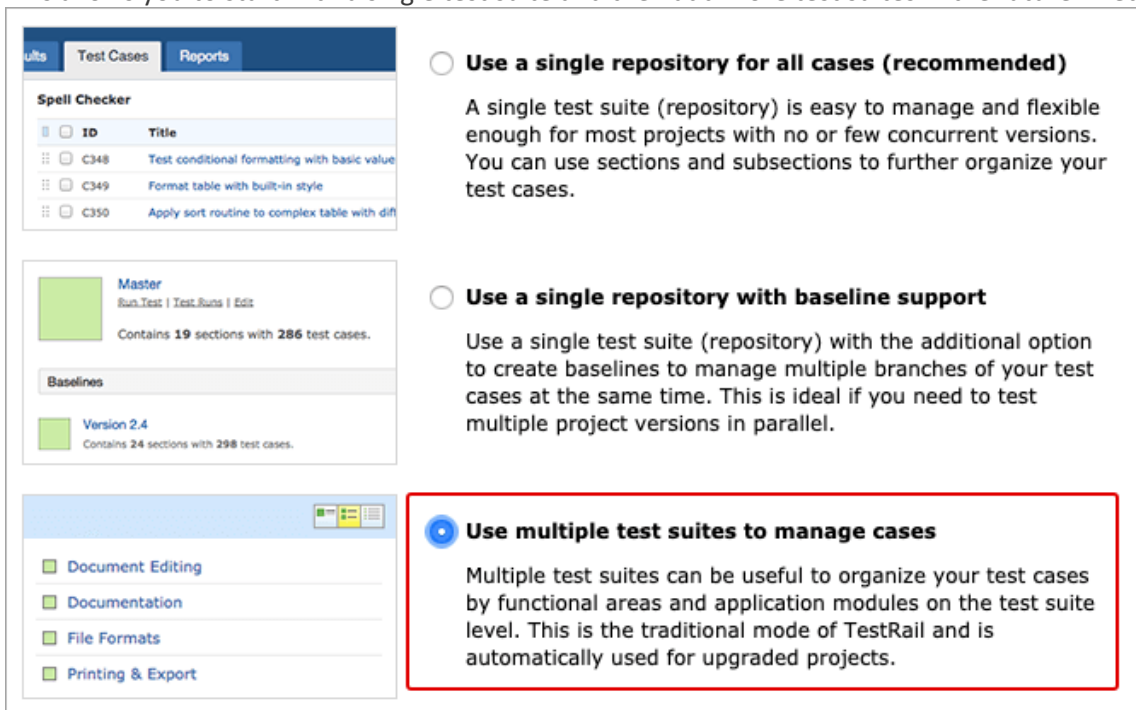
3.2 Click **Add Project**.
The dashboard will appear with your new project (if it doesn't, simply click the Dashboard tab). You can change the project's name or delete it later if you wish. The screenshot below shows the dashboard for an example project with multiple test suites and another project with a single repository.
Notice how the available options change depending on the type of project.
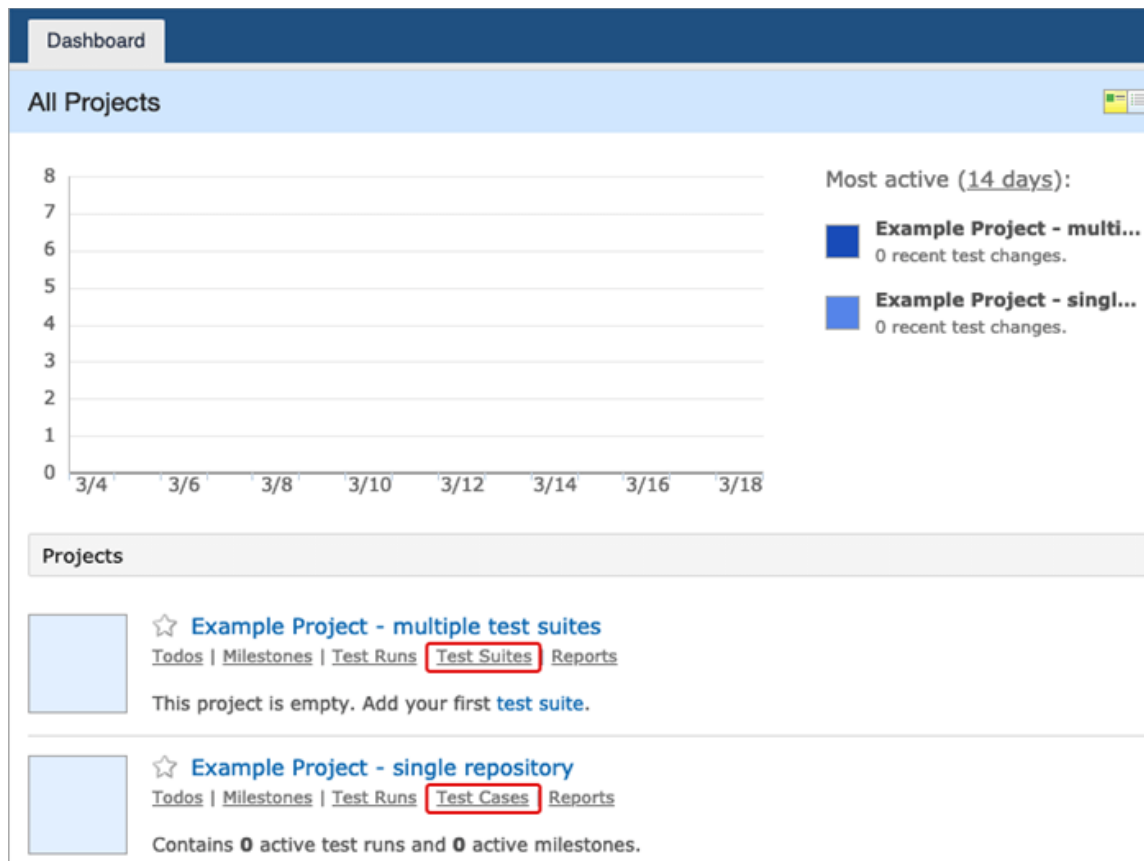
3.3. Click the **Test Suites** link under your new project. **If this is your first project**, then the Test Suites view will appear with a single default suite, called **Master**. Simply click the name of the suite to edit its sections and test cases. **Otherwise, click the Add Test Suite button to add a test suite to your new project, as shown in the image below.**

4. Adding Test Cases

4.1. Now let's add your first test case. Once the following message appears, click **Add Test Case**.

4.2. A detailed Test Case view appears, as shown below. Let's add a simple test named "Login."

4.3. The following four fields are required and can be used to sort and filter test cases: Section, Template, Type, and Priority. The optional "Automation Type" field is for integration with a test automation tool.

1. **Section** defaults to Test Cases. A section is created automatically for each new project.
2. **Template** defaults to Test Case (Text). TestRail comes with three built-in test case templates:
   - **Test Case (Text):** Includes text areas for pre-conditions, test steps, and the expected result (shown above). You can add screenshots to these text areas.
   - **Test Case (Steps):** Includes a text area for pre-conditions, plus rows for individual test steps with the expected result for each step. You can add a screenshot to each individual step.
   - **Exploratory Session:** Includes text areas for the mission and goals of the exploratory session.
3. Choose a **Type** for the test, such as Regression, Functional, Performance, or Automated.
4. Set a **Priority**, such as Critical, High, Medium, or Low.

4.4. Now you can complete the test case with pre-conditions, steps, and the expected results. Once you're done defining the test, click on **Add Test Case**. The test case summary appears, as shown below:

4.5. Let's add a few more test cases.

Click the **Test Cases** link to display the test case menu as shown below. All we really need right now is the title for each test case, so let's do this quickly using the Test Case Menu. Just click the **Add Case** link at the bottom of the list of test cases to add a title.

Click the green checkmark or press **Enter** to save and go to the next case. (Note that you can also import test cases from a CSV or XML file).
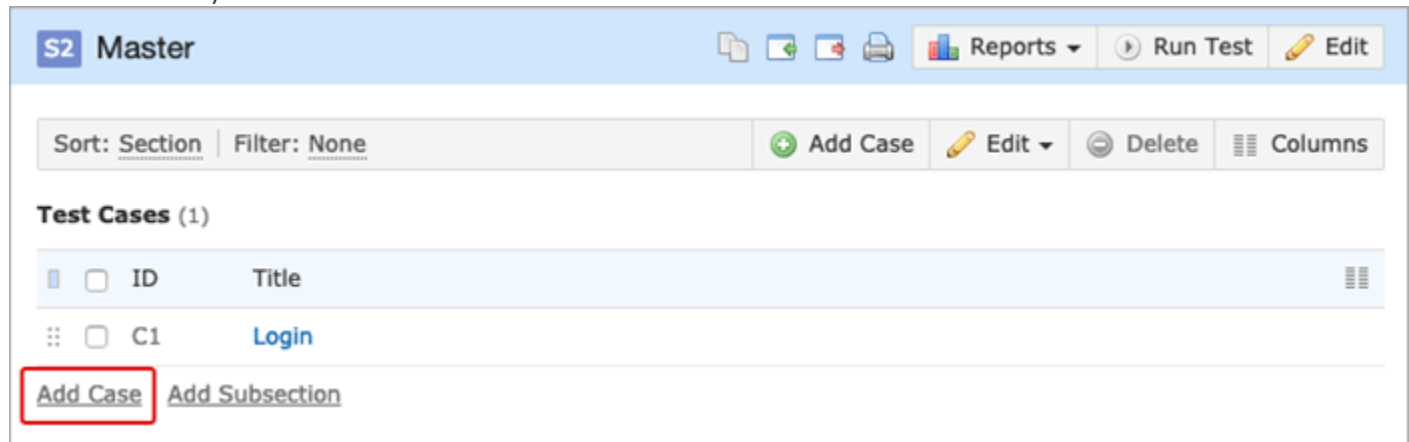

5. Build a Test Run

5.1. After creating your test cases, the next step is to build a test run. This is a set of tests that you want to use for a specific purpose such as regression testing, smoke testing, new features testing, risk-based testing, acceptance or in-sprint testing.

For each test run, you can create a name & description, link to a milestone, identify which test cases to include, and assign the run to a particular user or group for execution. Click the **Test Runs & Results** Tab, and then click the **Add Test Run** button.

If prompted to select a test suite, choose "Master" and then click **OK**.
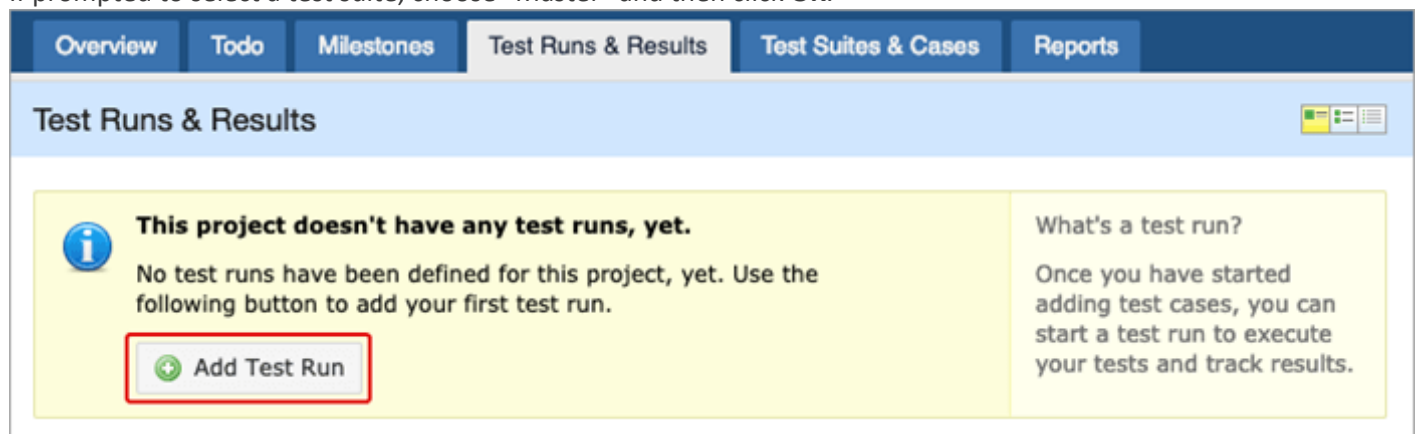
5.2. The **Add Test Run** screen appears, as shown below. As we chose the multiple test suites option earlier, the name defaults to the name of the test suite. Otherwise, it defaults to "Test Run <date>." You also have the option of assigning the test run to a **Milestone**.

Use the **Assign To** field to assign the test run to a user. Let's go ahead and choose the option to **Include all test cases**, and then click on **Add Test Run**.

Add Test Run

Name *

Master

Either reuse the test suite name or specify a new one.

Milestone

The milestone this test run belongs to.

Assign To

The user to whom the tests of the new test run should initially be assigned. An email is sent to the user if email notifications are enabled.

Description

Use this description to describe the purpose of this test run.

🔘 **Include all test cases**

Select this option to include all test cases in this test run. If new test cases are added to the test suite, they are also automatically included in this run.

⚪ **Select specific test cases**

You can alternatively select the test cases to include in this test run. New test cases are not automatically added to this run in this case.

✔ Add Test Run   ✖ Cancel

5.3. Now the **Test Runs & Results** screen appears. If you are following along with this walkthrough, you will see a single test run, "Master," that is zero percent (0%) complete. The sample screen below shows a project with four runs in progress and several completed runs.
To view or update the progress of a test run, simply click its name.
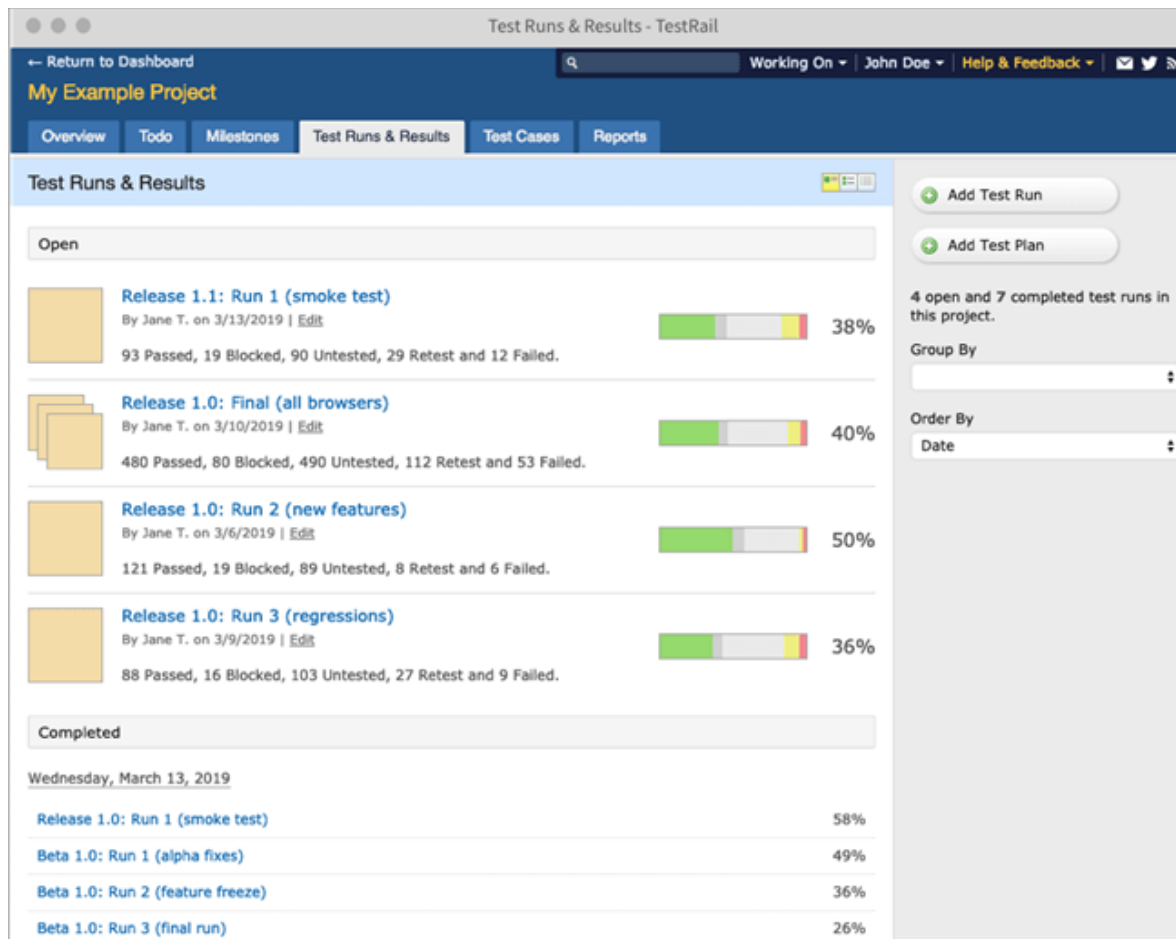
5.4. The screenshot below shows the status of a test run in progress.
As each test is executed, a tester can update its status as passed, failed, etc. It's also possible to set the status of multiple tests at once. If you're following along with the walkthrough, use the drop-down to set the status of your login test case to **Passed**.
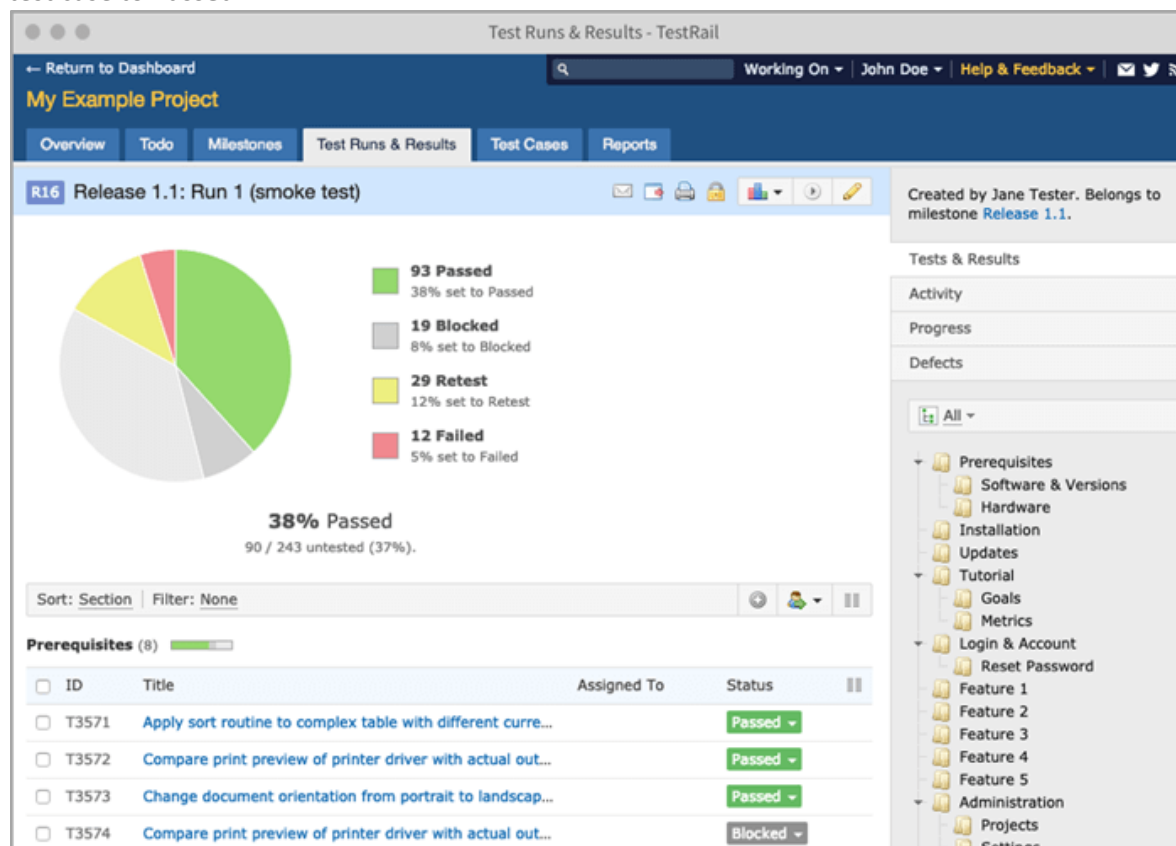
6. Results

6.1. The **Add Result** window will appear, where you can add comments about the test, assign it to another team member, attach a screenshot, and even push the defect to your integrated issue tracker.

For Example, assume that you're using Jira for issue tracking. After you submit your result, the test case is updated with the defect ID in Jira, and the Jira issue remains connected to the test case through the TestRail API. Any updates to the issue in Jira will also update TestRail.

After the defect is fixed, you can use TestRail's re-run feature to re-execute the test and enter the new results.

6.2. Click **Add Result** to close the window and return to the test run in progress. Notice that the pie chart has been updated to reflect the status change.

7. Reports

6.3. As you've got a test result, you can explore many customizable reports within TestRail. The sample screen below shows the reports available from the test run. More reports are available from the **Reports** tab.
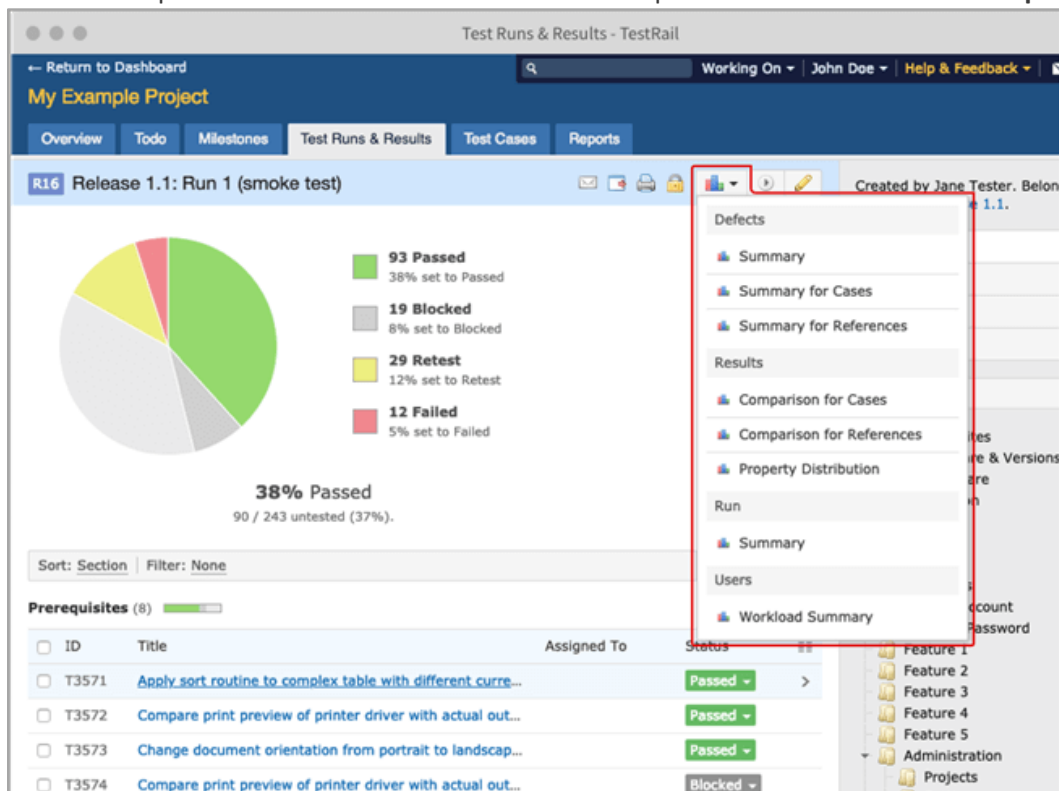
8. Milestone Setup

Although it isn't necessary to set up milestones to execute test runs, it's a good practice. Milestones allow you to track progress across multiple test runs for goals such as a software release. Use the **Milestones** tab to add them. The sample screen below shows a project with three open milestones and two completed milestones.

Once all tests are complete in a test run, you can lock the run which will prevent future changes. Hence, even if a test case changes for a future run, its definition is preserved for the current run, in case you need to audit the results later.

9. Connect TestRail and Jira

9.1. Generate a Jira Cloud API Token

1. Login to your Jira Cloud instance and go to account settings. This can be accessed by clicking your circle icon on the top right-hand side and selecting **Account Settings.**
2. Select the **Security** menu and click on the **Create and manage API tokens** link.
3. Click **Create API token** and provide a label name. This can be anything you prefer.
4. Be sure to copy or save your token as you will need this later on. Afterwards, proceed with selecting **Close**.

DEMO: CREATE API TOKEN - **https://www.youtube.com/watch?v=rJvNDh82SlM**

9.2. Configure Jira integration in TestRail

1. Log in to your TestRail instance and navigate to **Administration > Integration**.
2. Select the **Configure Jira Integration** button.
3. Provide your Jira Cloud Web Address URL. Usually, it looks something like *https://yourcustomname.atlassian.net*.
4. Under **Jira Version**, it should remain Jira Cloud as the option.
5. Under **Jira Email address**, provide the email address you have with your Jira Cloud instance.
6. Ensure that both the **Defect** and **Reference** checkboxes are enabled and select **Save Settings.**
7. Scroll down and select **Save Settings** to finalize the changes.

For Jira cloud integration, you should use the **Jira Cloud plugin**, and authenticate the integration using your **Jira email address** and **Jira API token**.

DEMO: CONFIGURE JIRA - **https://youtu.be/VDzn6PLyqSk**

9.3. Get the "TestRail Integration for Jira" app

The "TestRail Integration for Jira" app allows you to directly review related test results, test case links, TestRail dashboard statistics and new case buttons directly from inside Jira. To get started, simply activate the TestRail add-on for Jira Cloud from the Atlassian Marketplace:

Activate TestRail add-on from Atlassian Marketplace

Alternatively, you or your Jira administrator can enable the add-on within your Jira instance by navigating to **Settings > Apps > Find New Apps**, then search for TestRail. From there, click the **TestRail app > Get App > Get It Now**.
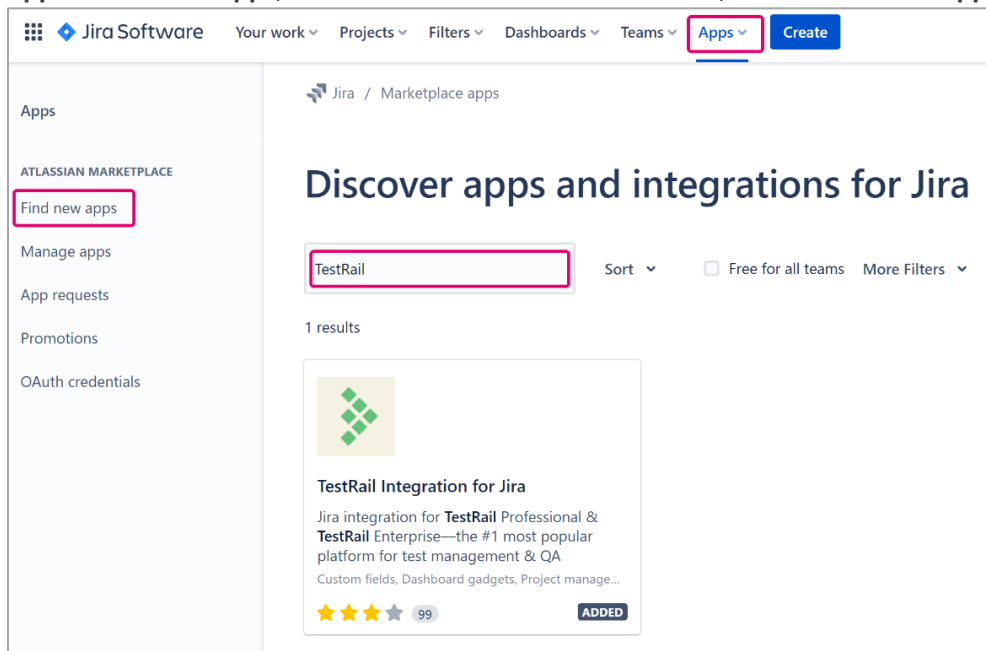
Next, simply configure the add-on with your TestRail address and key. Click the **Apps** dropdown in the top menu, select **Manage apps**, expand the **TestRail for Jira Test Management** app, and click **Configure**. Then simply configure your TestRail address and integration key and any additional optional settings.