Session-Based Test Management

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Get Things Done

Challenges:

1) Internal interruptions

- e.g. mind wanders, yaks, food/drinks, Internet searches, etc.

2) External interruptions

- e.g. email, people coming by, phone, etc.

What do you need to get done?

- Make a To Do list and prioritize it:
  - Meetings (project updates, daily stand-ups, …)
  - Research & investigation
  - Set up a test environment
  - Test something
    - New feature testing
    - Regression testing
    - Smoke/Sanity testing, …
  - Create/maintain automation scripts
  - Create/maintain test documentation

Session-Based Test Management

SBTM in a Nutshell

- SBTM is a *container*
- It is a wrapper around your daily testing activities that allows you to:
  - Keep track of the who, what, where, when, how and why of the testing performed
  - Generate new insights and patterns into the testing activities
  - Complement Exploratory Testing with a learning and knowledge-sharing framework

Where does it fit in?

Radiate information to Customers/Users

Radiate information to Development team members

Quality / Value

Test Strategy

SBTM

Q: Is SBTM for Agile? for Waterfall?

=> Yes.

Sits above the Testing activities and *below* the high-level reporting

Lab Environment Setup & Maintenance

Research & Investigation

Bug Reporting

Testing, Design, Test Case Execution

Test Documentation

Automation

Debriefs, Reviews

What SBTM is NOT

- SBTM is not a "type" or "approach" to Testing
- The following does NOT make sense:
    - "We do Functional testing, SBTM, Regression testing and some automation on our team."
- SBTM is not Exploratory Testing
- SBTM is a way of managing *all* the daily testing work
    - It's like the Pomodoro Technique - Get Things Done
    - If you choose to use SBTM, I recommend you use it to manage **all** your testing activities

SBTM Framework

- Four Basic Elements:
    1) Charters
        - Mission or purpose - it drives everything
    2) Time box
        - No interruptions for a set amount of time - stay focussed
        - 30 - 120 minutes (i.e. 1-4 pomodoros)
    3) Reviewable Result
        - Capture your thoughts, record observations, synthesize
    4) Debrief
        - Discuss/share your findings

Special Attention

- Charters are tricky. They take practice.
  - Elisabeth Hendrickson's book "Explore It!" has the best coverage on Chartering I know.
  - EH's book covers Exploratory Testing and not all sessions will necessarily be ET

  - In all cases, I often refer to this quote:

      I keep six honest serving-men
        (They taught me all I knew);
      Their names are What and Why and When
        And How and Where and Who.

      ~ *"The Elephant's Child"* by Rudyard Kipling

⚠️ *Extra Special Attention*

- Debriefs are the hardest part of this whole framework
  - Giving and receiving feedback
  - Many ways to do it:
    – One-on-one
    – Team-based
- G. Weinberg on the *Satir Interaction Model*:
  - Intake
  - Meaning
  - Significance
  - Response

Practice

Practical Tips

1. "Senior" Tester required for Test Lead role
   - Someone who is experienced and knowledgeable in Testing - to coach juniors and fill in gaps
   - Someone who is disciplined - to maintain the practice
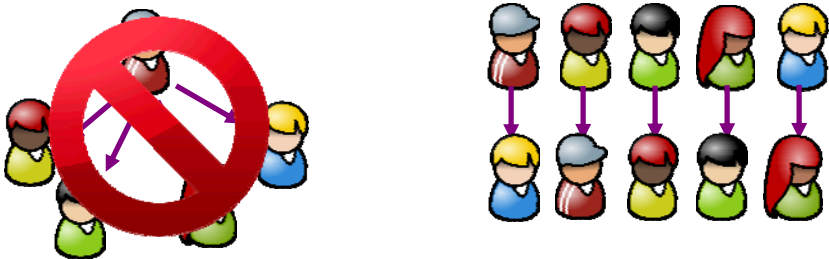   - Passionate - motivate others to learn and grow

Practical Tips

2. Debrief Every Day
   - These are like Scrum daily stand-ups
     1. Learn what happened
     2. Identify potential risks
     3. Set the priorities for the day ahead
   - *Especially* do them when you are very busy!

Practical Tips

3. Writing good <u>concise</u> notes takes time, practice, and *good* feedback.
   - A Test Session is like an experiment
   - Think of a Science Report:
     - Objective/Purpose (the Charter)
     - Materials & Methods
     - Data and Observations
     - Conclusions/Inferences
   - ❖**WARNING:** Don't write essays!

   ➢**Focus:** Clarity, Coverage, Completeness

Practical Tips

4. Testing History at your fingertips
   - *Question:* Can you bring up all the testing notes for a particular feature or component within the last year? (you have 60 seconds)

   - Having searchable notes helps build & share knowledge
   - Strengthens regression testing
   - Provides audit trail for when you need it

Practical Tips

5. Mine your Test Notes - Create *Test Guides*
   - Project info: # testers, total time, # bugs found
   - Setup info, environments tested, ...
   - Important risks, unique charters
   - Testing checklists, tables, mind maps, ...
   - Issues, obstacles, roadblocks encountered

   Accelerate Your Testing!

   Exploratory Testing -> Automation Guide

Metrics

⚠️ *Cautionary Note!*

- Metrics help you transition from SBT -> SBT**_M_**
- I only use metrics *within* the test team
  - I *don't* share them with anyone outside the team
  - Productivity Metrics are dangerous, especially for individuals -> always **aggregate** the data
  - Metrics will be gamed when testers are measured to them
- Good metrics provide insights, raise more questions

Tips on Metrics

- These examples follow the Satisfice SBTM framework
  - Tools: Sessions.exe (Perl) or CLR-Sessions (Ruby)
- The original Satisfice SBTM framework suggests the following *Activity Hierarchy* for a tester's work day:

This is okay for a start. With experience you may expand this view/model.

(FYI: Test cases happen in here somewhere)

Starter Metrics

- The 'Sessions' tool includes a spreadsheet called "et.xls"
  - Open it. Point it to your data files. Update it.
  - Basic data reports on *Activity Hierarchy* elements:

Date	07-Mar
Number of Sheets	675
Bugs Reported	795
Issues Reported	30

Custom Metrics

- You have a *spreadsheet* so go wild! =)

More Metrics

- If you track your Charters, you can generate interesting metrics there too. For example:
  - *Charter Burn-down* - ref: Mike Kelly (T: @michael_d_kelly)
  - *Rosetta Stone* - ref: Paul Holland (T: @PaulHolland_TWN)

- These are all nice, but DON'T FORGET *THE* most important metric:
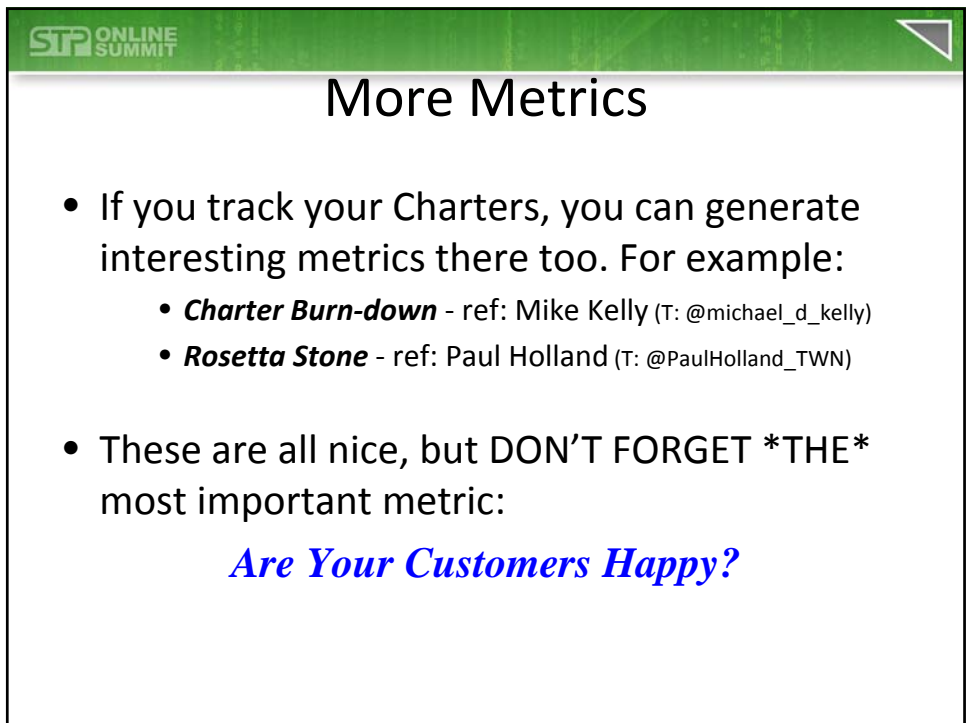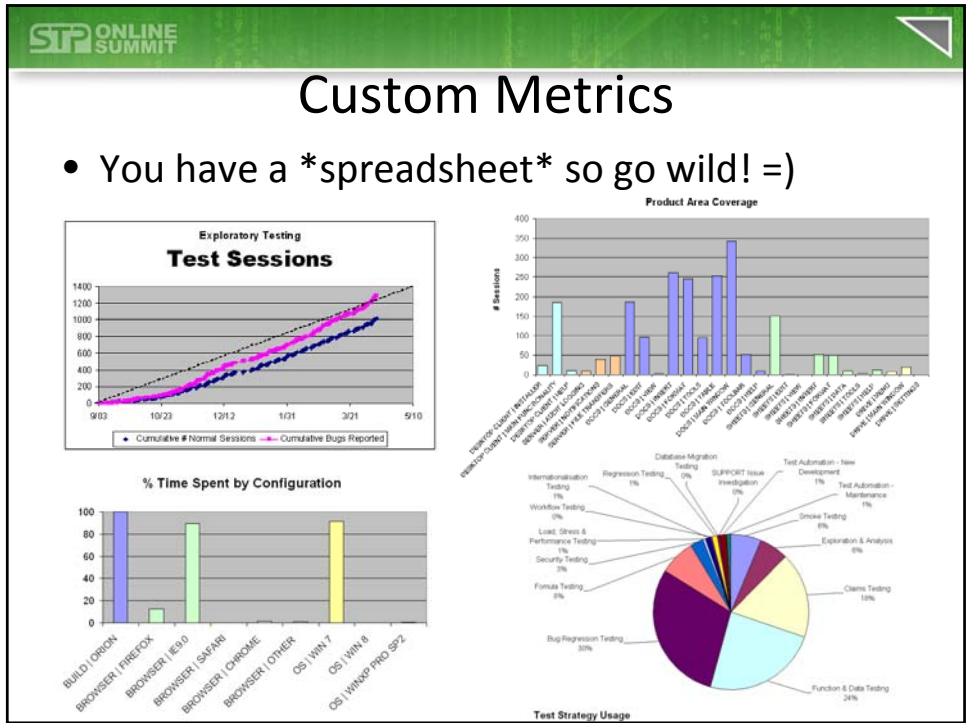
  Are Your Customers Happy?

Summary

- SBTM is about getting things done
- It helps you manage your testing activities
    - There are other ways. Choose responsibly.
    - Value is primarily *within* the test/development team
    - *Doesn't* help you manage or communicate your Testing Strategy (that's a level higher)
- Metrics may provide additional insights and patterns into your testing activities
    - Keep these within the team

Tool Warning

- I **don't** recommend the command-line Sessions tool/framework for extended project work
    - It's okay for short projects (< few weeks) and as a learning/teaching aid for Exploratory Testing
    - It is difficult to try and manage large or multiple (realistic) projects this way. Look to other solutions
- Select the right tool for your project & team needs

SBTM Resource Page

- http://www.MinistryofTesting.com/resources/session-based-test-management/
- Resources include:
    - Videos
    - Blog Posts
    - Articles
    - Tools
    - Books
    - Training (YMMV)

Contact Information

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Thanks!