

# TIPS FOR MORE EFFECTIVE TEST CHARTERING

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# The problem...

- When I'm teaching exploratory testing, I find that one of the most difficult things to learn can be chartering.
- If you're not practiced at moving from the abstract to the specific it can be very difficult.
- It becomes even more difficult to figure out what will actually fit in your session time box.



“What am I suppose to be doing...”



“I ran out of time...”



“I ran out of test ideas...”

# Focused testing starts with good test ideas

## Emergent test ideas...

- ❑ Don't feel like you need to develop all your charters in one sitting or all of them upfront.
- ❑ Be comfortable with charters emerging slowly over time.
- ❑ While you'll need some charters defined upfront so you can get started, often you'll find that your charter-base will fill in as you go.

## How ideas move...



# Make the mission clear

## Drill down to specifics

- Take the time to state the mission (or purpose) of the charter as clearly as possible.
- Don't say "Test the portal for reporting accuracy" when you can instead say "Test reports X, Y, and Z for errors related to start and end time selection criteria, summing/ totally, and rounding."
- In my experience, the more specific you are, the better your testing will be. If you need to take an extra 30 to 120 seconds to get more specific, take them.

## Compare your missions

- If you can't tell one mission from another, you've not done a good enough job defining it.
- If you have charters to "Test feature X," "Stress test feature X," or "Performance test feature X" can you tell me what the differences are between tests?
- Couldn't some stress tests be a subset of simple feature testing?
- Couldn't some performance tests be a subset of stress testing?
- If you can't compare two missions side-by-side and have clear and distinct test cases come to mind, than you might benefit from spending a little bit more time refining your missions.

# Try using a template

## Some examples:

- My mission is to test for various boundary errors for Microsoft Word's bullets and numbering feature.
- My mission is to test for accurate error messaging pop-ups for Ford Motor Vehicle's Build and Price website.
- My mission is to test for SQL injection vulnerabilities for application login and administration screens.

- Sometimes when I ask someone what their test charter is, I get a paragraph in response.
- That's not bad, but I find that it often leads to a poorly understood scope definition, which leads to lack of focus while testing, which leads to a charter that runs way too long or feels unproductive.
- I have a trick I use to help simplify the mission of the charter when this happens. Try using the following template:

"My mission is to test  
<insert risk here> for  
<insert coverage here>."

# Explain it to someone

- Sometimes, when reviewing charters with the team, I look to them to help provide some insight into what we should be focused on with our testing.
- One technique is to walk your list of charters (all twenty or them, or all 200) and have each person provide some insight into where they think it falls in priority.
- To facilitate this, I sometimes use a thumb vote.
- While most votes are fast and provoke little to no discussion, sometimes you see some odd votes. Like four up and four down. Those votes normally lead to some really great conversations. Often, people misunderstand the charter or have a different understanding of the risk involved. This surfaces those differences.

# While you're testing, check your mission

## Are you on mission?

- First, you want to make sure you're on mission.
- If you need to test for rounding errors in reporting, but you find you just can't stop testing filters and sorting, then create the charter for testing filters and sorting and execute that charter instead.
- You can always go back to the charter for testing for rounding errors.

## Disambiguate as you go...

- If you find as you test that you can better clarify your original mission, add that clarity as you go.
- It will help you when you go back to write new charters.
- The more clear you can make it, the easier it will be to recall what you actually tested three days later when you're looking back and trying to remember what work you still have in front of you.