Importing Manual Tests using Test Case Importer

You can use the Xray's Test Case Importer (a Jira Importer Plugin extension) to import Manual Tests from a CSV source file.

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Before importing

The CSV source file must follow some simple rules.

You can name the fields as you wish since they are going to be mapped during the importation process, but there are three mandatory fields:

1. Test Case Identifier – this is the field used to identify which lines belongs to which test case. In the example below, it is the TCID column.
2. Summary – this field is mandatory since Jira doesn't allow you to create an issue without a summary. In the example below, it is the Test Summary column.
3. Step – this field is mapped as the Step field of a Manual Test Step. In the example below, it is the Step column.

Here is an example of test cases structure:

	A	B	C	D	E	F	G	H	I
1	TCID	Test Summary	Test Priority	Component	Component	Step	Data	Result	
2	1	Test 1 for user story WEB-1	high	User Interface	Business Layer	Go to login page			
3	1					Enter username	peter		
4	1					Enter password	pwrd123		
5	1					Click login button		User successfully logged in	
6	2	Test 2 for user story WEB-1	very high	User Interface	Business Layer	Go to login page			
7	2					Enter username	peter		
8	2					Enter wrong password	abc123		
9	2					Click login button		User logged in fails with message	
10									

This is how the CSV file looks like once the test cases above are exported (download it from the downloadable examples section):

```
1  TCID; Test Summary; Test Priority; Component; Component; Step; Data; Result
2  1;Test 1 for user story WEB-1;high;User Interface; Business Layer; Go to login page;;
3  1;;;;;Enter username ;peter ;
4  1;;;;;Enter password;pwrd123;
5  1;;;;;Click login button;;User successfully logged in
6  2;Test 2 for user story WEB-1;very high ;User Interface ;Business Layer ;Go to login page;;
7  2;;;;;Enter username; peter;
8  2;;;;;Enter wrong password;abc123;
9  2;;;;;Click login button;;User logged in fails with message
10
```

CSV column separator

If you choose the "," (comma) as the CSV column separator, then you must use quotation marks around any field that contains commas.

Fields with line breaks

If you need to use new lines within a field, for example, in the issue description, then you need to quote the field.

Downloadable examples

- previous example with 2 test cases, semicolon delimited: default_doc_samples_for_test_case_importer.csv (CSV)
- 4 simple test cases, semicolon delimited, with standard custom fields: 4samples_for_test_case_importer_simple.csv (CSV), 4samples_for_test_case_importer_simple_configuration.txt (configuration file)

Importing Test Cases

Info

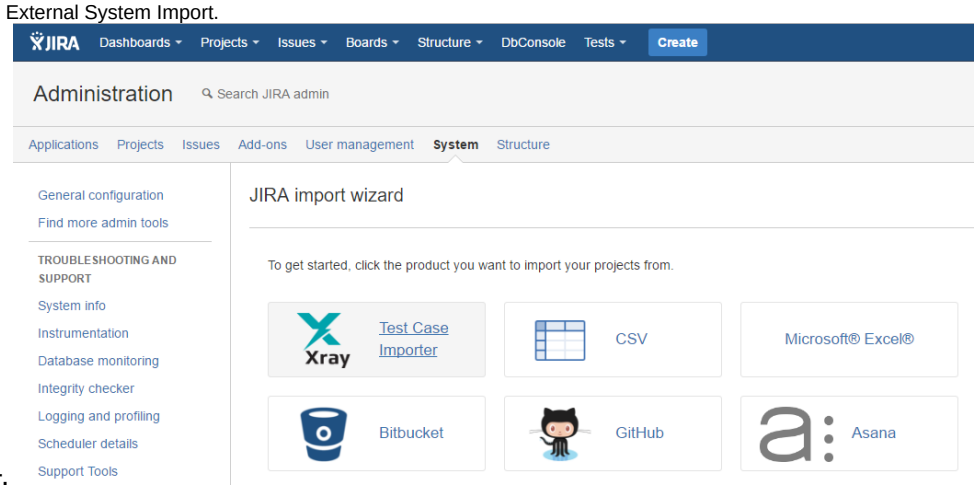
It is now also possible to import test cases as a non-administrator JIRA user. Please follow the described steps in order to use this feature

As a JIRA Administrator

For demonstration purposes, the CSV example file from the previous section is used.

To complete the importation process, follow the steps below.

1. Log in with an administrator account.
2. Go to System > Import and Export > External System Import.

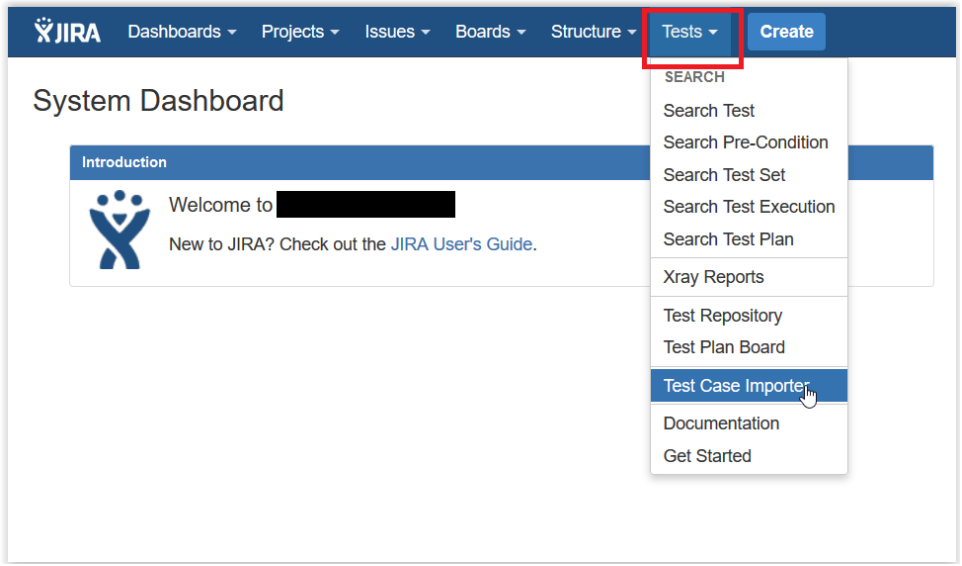


3. Select the Xray **Test Case Importer.**
4. Follow the Setup Page section instructions

As a Non-Administrator JIRA user

1. Log in with a non-administrator account.

2. Got to Tests menu > Test Case Importer as shown in the image

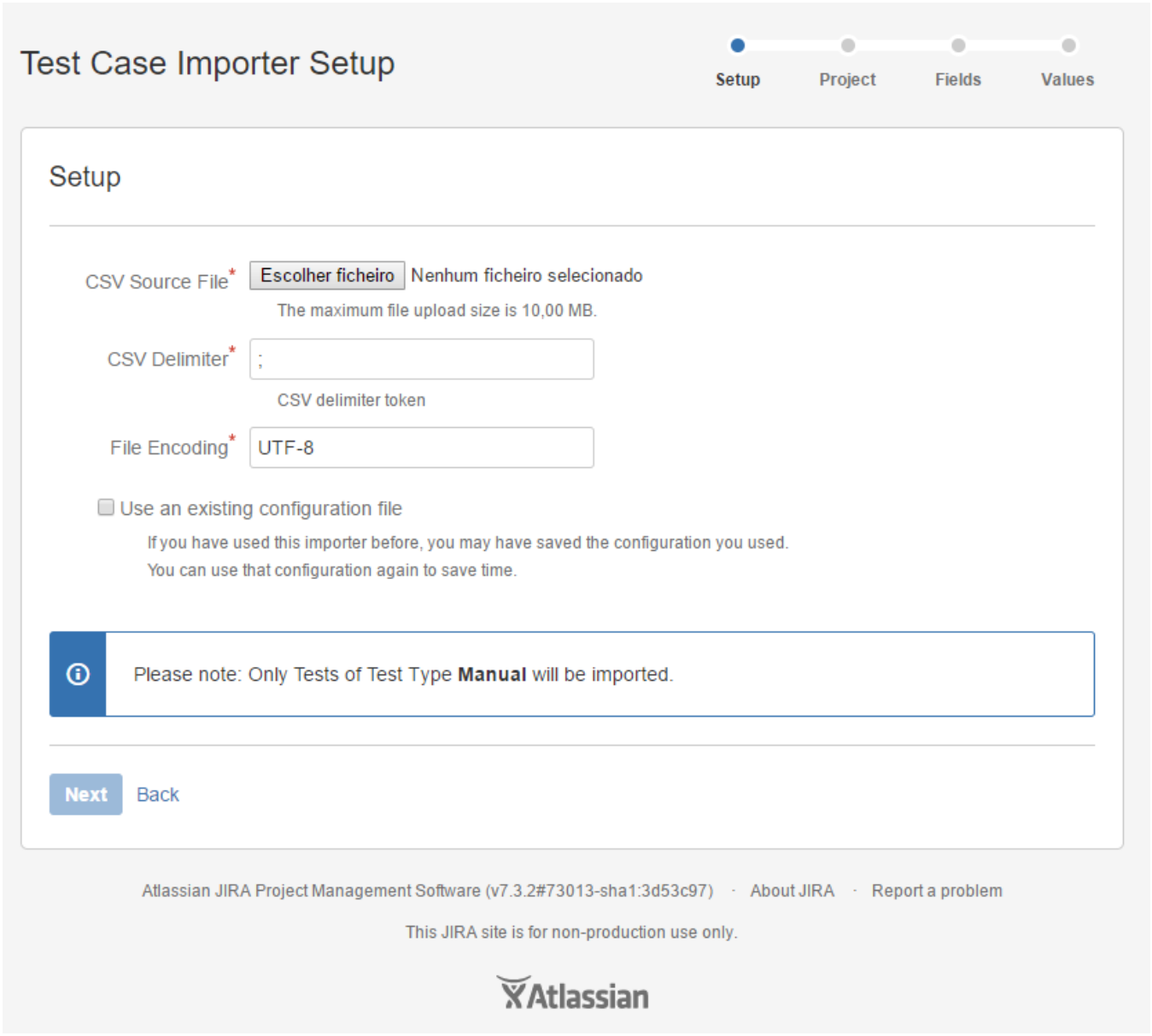


3. Select the **Test Case Importer** menu item
4. Follow the Setup Page section instructions

> **Permissions**
>
> Only users that have the **Bulk Change** permission will have this option available. The configuration can be found in the *Jira Administration / System*.
>
> Additionally the user will only be able to import data into projects where he has the **Create Issues** permission.

Setup Page

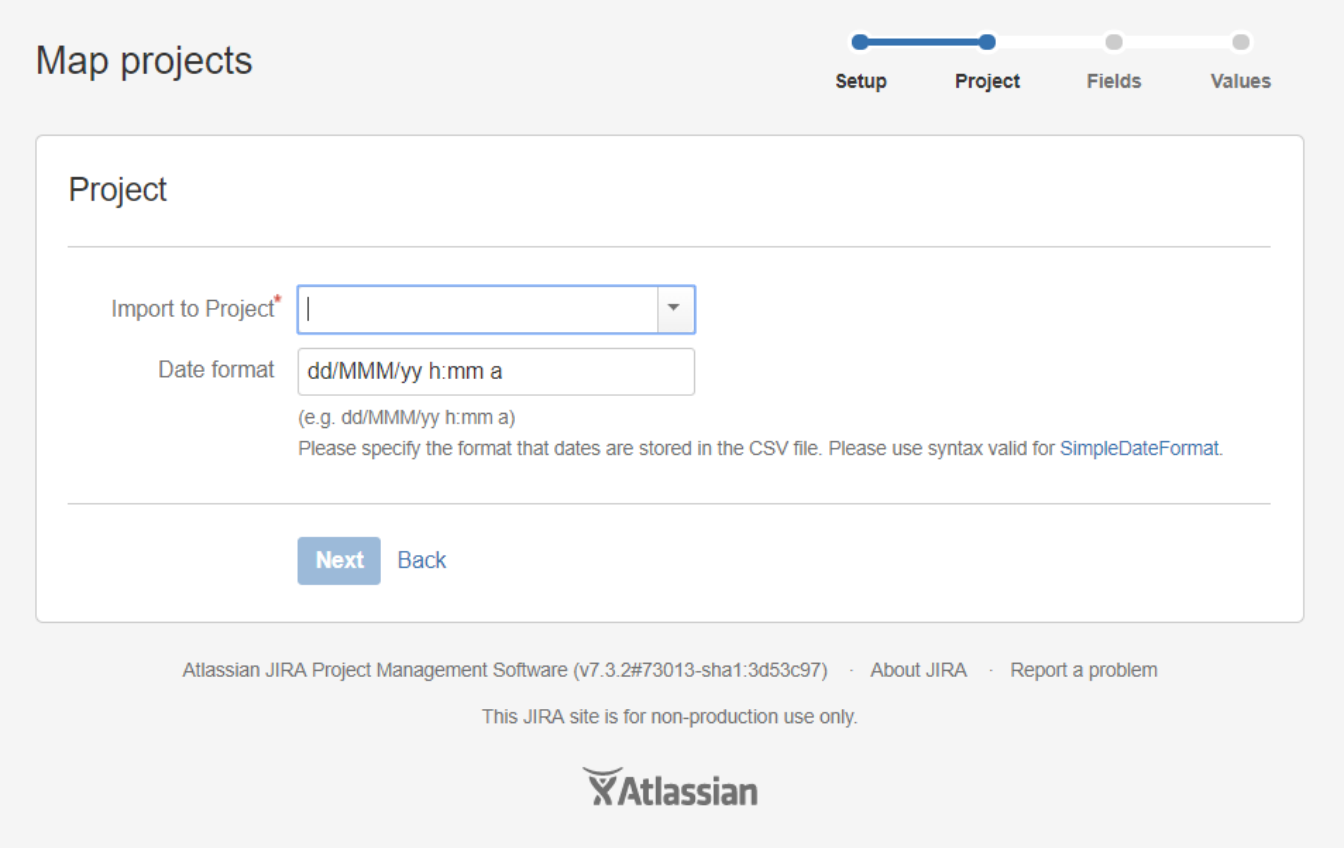
Provide the basic settings for the importation process.



- The CSV Delimiter field is the column delimiter used in your CSV source file.
- The File Encoding field is the encoding used in your CSV source file.
- Optionally, you can use the settings from a previous importation.

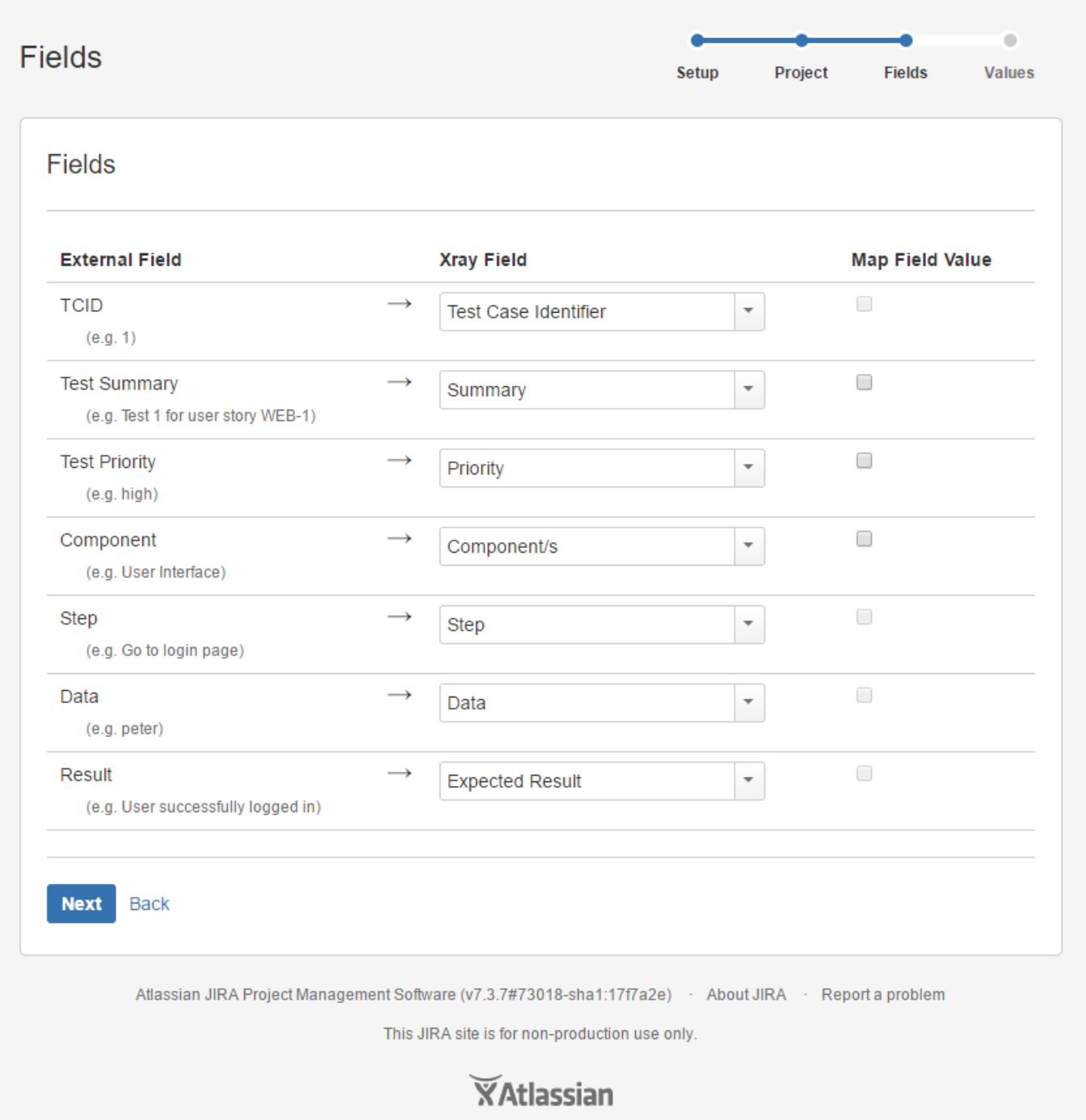
Project Page

Select the Xray project where you want your Manual Test cases to be imported.



Field Mapping Page

Map the fields from your CSV to Jira and Xray fields



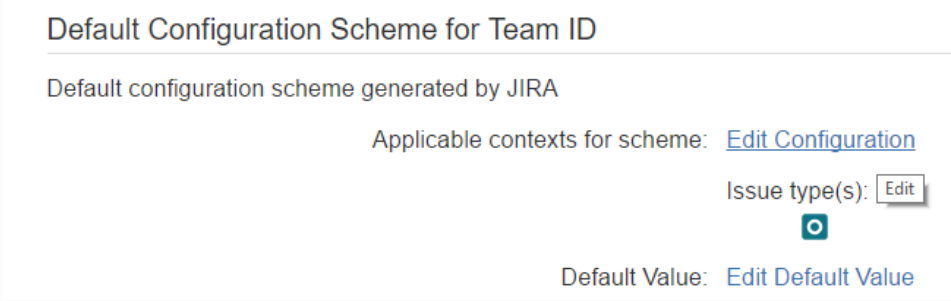
It is mandatory to map at least three fields:

1. Test Case Identifier (located under **Manual Test Step fields**). In this example, this field is mapped to the TCID column from the CSV file.
2. Summary (Located under **Jira fields**) In this example, this field is mapped to the Test Summary column from the CSV file.
3. Step (located under **Manual Test Step fields**) In this example this field is mapped to the Step column from the CSV file.

The fields that are not mapped will not be imported to the test case.

Custom field mapping

Only custom fields that have the issue type **Test** selected as one of the applicable issue types will be available for mapping.



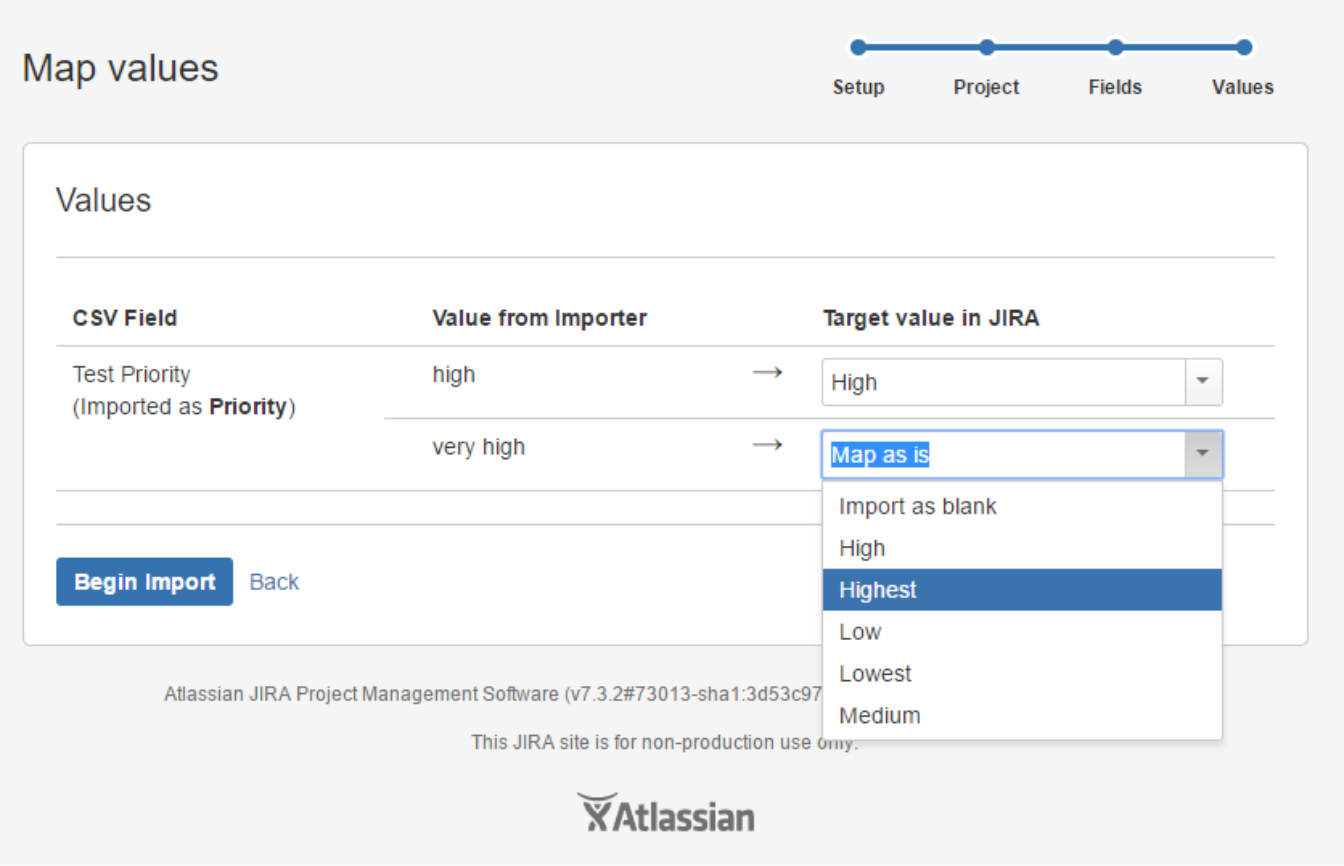
Available **custom fields** for import:

- Checkboxes
- Labels
- Number fields
- Radio buttons
- Select lists (single choice and cascading)
- Text field
- URL field
- User picker

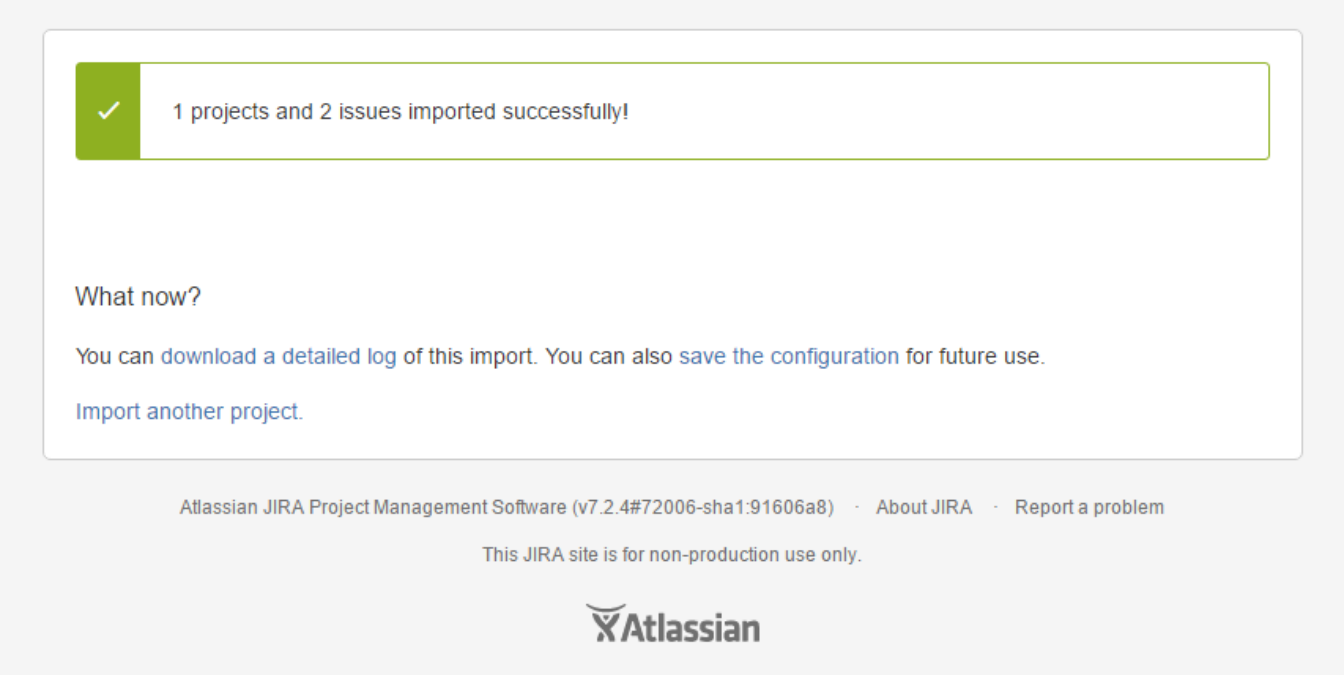
Note: Only "single-value" custom fields are supported. "Select List (cascading)" custom fields behave as a single-value field; in that case, you have to specify the value in the format "parent -> child" as mentioned also for Jira's native CSV importer.

Value Mapping Page

Map the CSV column values. In the example above, the Map Field Value checkbox is selected for Priority, so those values are going to be mapped.



Now just click Begin Import and Xray Test Case Importer will import the manual test cases to the selected project.



The importation process is complete. A configuration file can be saved to import other manual test cases in the future.

Special fields

Attachments

It is possible to attach files to **Test** and to **Test Steps**.

Attachments

The attachment may be referred by name (in this case the file:// protocol is assumed), by "file://" or "http(s)://". Multiple files may be specified within one CSV column; for this, the attachments must be delimited by space.

```
TCID,Test Summary,Test Priority,Component,Component,Step,Data,Result,myNumberField,IssueType,Attach Steps,Attach
1,Test 1 for user story WEB-1,high,User Interface,Business Layer,Go to login and enter your credentials,,,123,Test,image.png file:///txt_folder/test.txt,
1,,,,,Enter username,peter,,,,,
1,,,,,Enter password,pwrd123,,,,,
1,,,,,Click login button,,User successfully logged in,,,,
2,Test 2 for user story WEB-1,very high,,Business Layer,Go to login page,,,456,Test,https://address/error.log,image.png file:///txt_folder/test.txt
2,,,,,Enter username,peter,,,,,
2,,,,,Enter wrong password,wrngpass,,,,http://address/image.jpg,
2,,,,,Click login button,,User logged in fails with message,,,,
```

Note: For file protocol, only files in the "**<JIRA_DATA_HOME>/import/attachments**" folder will be imported.

Test Repository folder

If you want to add the Tests to some folder within the Test Repository, you can specify a column having the Test Repository Path.

Folders and their respective sub-folders must be delimited by "/", as shown in the following example:

A	B	C	D	E	F	G	H
TCID	Test Summary	Component	Step	Data	Result	Test Repository Path	
1	Test sum of two numbers	UI	press 1		1	components	
1			press key	+	+		
1			press 2		2		
1			press key	=	3		
2	Simple Test Case	Core	press ON		calculator turned on	components/compA	
3	Another, yet simple Test C	Core	press OFF		calculator turned off		

During the mapping step, you need to map the CSV column containing the path to the "Test Repository Path" Xray's custom field.

Please note

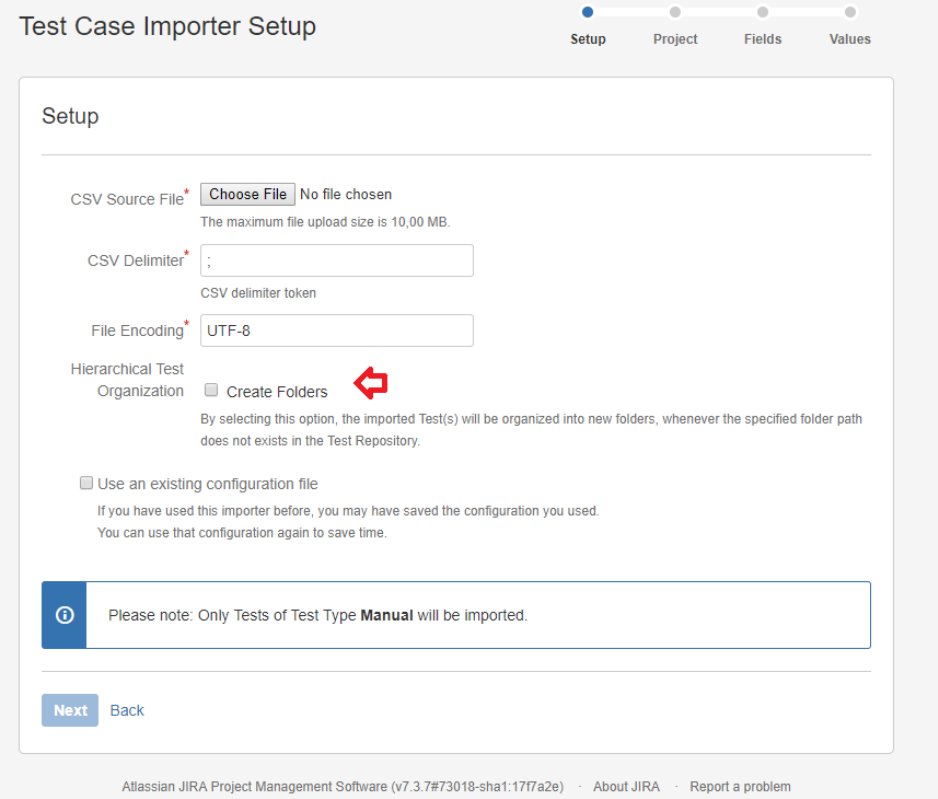
The "Test Repository Path" is case insensitive and each folder is trimmed (spaces are removed from the start/end of it).

This means that "components/compA", "components /compA", and " components/COMPA" are all the same and will be mapped to the same folder within the Test Repository.

If the folder is not found, then the Test is created, but it is not associated with any folder; it will appear in the "Orphans" meta-folder. Unless you selected the option 'Create Folders', in the Setup page.

To create new folders and sub-folders, in case they do not exist in the Test Repository, you must select the option 'Create Folders' in the Setup page of the Test Case importer.

Make sure you have the Hierarchical Test Organization enabled and the logged in user belongs to a Project Role allowed to edit the Test Repository. You can check this settings under the Xray Global Settings.



Links

You can import a link to other issues for newly-created Tests by choosing the "Link ..." mapping.

Links to requirements

When importing Tests, you can specify the links to the requirements that each Test validates. For that purpose, columns must be mapped as **Link "Tests"**.

If the Test covers multiple requirements, then multiple CSV columns must be used, each one being mapped in the same way.

Date Time fields

Dates and Date Time field formats must comply with the Java SimpleDateFormat. On the project mapping page, the format used on the CSV file should be given in order for the import process to complete without errors or warnings.

Example of valid SimpleDateTime formats

- dd/MM/yyyy hh:mm
- dd/MMM/yy h:mm a

Comments

Comments can be added to Test issues using the "**DateTime;User;CommentBody**" syntax, where DateTime and User are optional.

More that one comment can be added for each issue, by adding more than one column on the CSV file.

DateTime uses the Date Time format specified on the project mapping page, and User must be a valid username.

Example valid comment entries

- 01/01/2012 10:10;Admin; This comment works
- 01/01/2012 10:10; This comment also works
- "This comment is only the text body"

Priorities

An issue's priority defines its importance in relation to other issues. You can read more here. Before Jira 7.6, priorities could only be defined globally (i.e, for all projects). In Jira 7.6, Jira allowed a Project to have custom Priority Scheme. When using Jira CSV importer, Jira has different behaviors when Priorities are provided or not, depending on the Jira versions.

Xray will have the same behavior, no matter what version of Jira. When a user (admin or not) is trying to import a CSV with Xray Test Case Importer:

- Priority is provided and is associated with Project: Xray will create the Tests with the priority provided in CSV
- Priority is provided but does not exist or is not associated with Project Scheme: Xray will create Tests with the default priority if set, or with the lowest ranked priority;
- Priority is not provided: Xray will create Tests with the default priority if set, or with the lowest ranked priority;

Useful tips for importing Tests

Importing data in any system is a non-linear process; you may need to run it multiple times until you get the expected result because it is easy to forget to map a field or use a delimiter, etc.

- Add a unique label to all your tests, so you can clearly identify the tests imported at a given time. This will make analysis simpler and performing bulk operations (e.g., change fields, remove fields) will also be easier.
- Use a custom field for storing the external ID of the tests in their original system. Thus, whenever tests are imported, you can easily compare them with the original tests in the original system;