

Steps (Manual Tests)

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Overview

Manual Tests are user-assisted tests, listing an assortment of guidelines the user must follow, and the results that such behavior is expected to accomplish. If the actual test result matches the expected test result, the test is considered as passed; otherwise, it is marked as failed.

"**Manual**" is the default **Test Type** in which Tests are specified with an **ordered list of steps**.

By default, each Test Step has the following fields:

- **Action*** - the action to be reproduced by the tester.
- **Data** - any data the related step requests (e.g., login credentials) to be used by the tester
- **Expected Result** - the behavior the step should accomplish.
- **Attachments** - external files that provide additional information related to the corresponding step. Attachments can only be added or removed in the Test Issue view page.

Only the **Action** field is mandatory. All other default fields are optional.

The order by which steps are defined is important. Users must start executing Test Steps in ascending order.



Test Step Custom Fields

It is possible to define your own Test Step custom fields or even disable the native Xray fields for Test Steps. You can configure the Test Step fields on the [Project Settings > Test Step Custom Fields](#).



All open text fields, Xray native or custom fields, support the [Jira markup wiki language](#).

Defining Test Steps

Test Steps can be defined in two view modes in Jira:

- Using the Jira create/edit issue dialog
- Using the Inline Edit directly on the Test issue

Both views provide the same Xray Test Steps component with small differences in behavior and functionality

Using the Jira create/edit issue dialog

checkout items that are not in stock

Do In Progress Done Admin

Edit Issue : STORE-63

Configure Fields

General Test Details Test Sets Pre-Conditions Test Plans Link Issues

Test Type Manual

Choose the Test Type

Steps

Grid

Add Step

1 Go to test item with Id: 2334.

2 Add the item to the shopping cart.

Action

Style B I U A Link Image List Bulleted Numbered Table

In the back-office application, update the stock to 0 on item

Visual Text

Data

Enter value...

Expected Result

Enter value...

Done Cancel

4 Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

Comment

Style B I U A Link Image List Bulleted Numbered Table

Update Cancel

Xporter

Template

Issue Details Excel

Output format

XLSX

Export

People

Assignee:

Unassigned

Assign to me

Reporter:

Admin

Votes:

0

Watchers:

1 Stop watching this issue

Dates

Created:

32 minutes ago

Updated:

32 minutes ago

Agile

View on Board

Hipchat discussions

Do you want to discuss this issue? Connect to Hipchat.

Connect

Dismiss

Using the Inline Edit directly on the Test issue

↶ ↷ ↶ ↷ ⓘ Import ▾ Export ▾ + Add Step		
	Data None	Expected Result The current stock is 1.
t.	Data None	Expected Result Shopping cart now displays one 2334 item and no items in stock.
late the stock to 0	Data None	Expected Result None

checkout. Go through all the steps and confirm the payment method.

e mentioning that there are no more items in stock and the payment was not made.

the shopping cart.

ed to shopping cart page with a message mentioning the item was removed because there is no stock.

Done

Cancel

View Mode

There are two view modes (or field layouts) for the fields inside the steps:

- Grid Mode
- List Mode

Grid Mode is the default view mode. This view displays all the fields inside a step within a grid with a maximum of 3 fields per row. If there are more than 3 fields defined, the remaining fields will appear in the second row inside the step. Depending on the field type, if the number of fields is not 3 or 6 exactly, the text fields will fill the remaining space in the row.

This mode can be used whenever users have more horizontal available space. This way, viewing or editing each step might feel more natural because it uses less vertical space and the step fields are all in the user's field of view.

Steps dialog

Grid

List

Grid

Import

Export

+ Add Step

1

Grid

Action

Go to test item 34.

Data

None

Expected Result

The current stock is 1.

Attachments (0)

2

Grid

Action

Add the item to the shopping cart.

Data

None

Expected Result

Shopping cart now displays one **2334** item and no items in stock.

Attachments (0)

List View displays all step fields vertically inside the step. This view compromises the overview of all steps fields in a row in order to maximize horizontal space for each field. In smaller screens, especially if there is a lot of text within the fields, this view is more indicated for readability.

Steps dialog

List

↗ ↖

↖ ↗

ⓘ

Import

Export

+ Add Step

1

⋮

↓

Action

Go to test item **34**.

Data

None

Expected Result

The current stock is 1.

Attachments (0)

↑

2

⋮

↓

Action

Add the item to the shopping cart.

Data

None

Expected Result

Shopping cart now displays one **2334** item and no items in stock.

Attachments (0)

1

Grid

List

Action

Go to test item 34.

Data

None

Expected Result

The current stock is 1.

Attachments (0)

↑	Action
2	Add the item to the shopping cart.
⋮	
	Data
	None
	Expected Result
	Shopping cart now displays one 2334 item and no items in stock.
↓	Attachments (0)

Collapse/Expand Steps

Test Steps can be **collapsed** in order to provide a better overview of all steps. Collapsed steps will only display the first line of the **action** field. This way, the steps become very condensed, and more steps can be viewed allowing for a better overview of the Test. When navigating from Test to Test in Jira, collapsed steps can provide a better user experience for identifying a given Test case.

Of course, collapsed steps can be expanded at any time to view all the step content.

Collapse and expand can be applied to:

- individual steps, or
- all steps

Individual Steps

In order to collapse a given step, you need to hover the step to see the actions bar at the right of the step and click on the collapse action (the top icon).

↑

2

⋮

↓

Action

Add the item to the shopping cart.

Data

None

Expected Result

Shopping cart now displays one **2334** item and no items in stock.

Collapse

Attachments (0)

In order to expand a step, you need to click anywhere on the step content.

2

⋮

Add the item to the shopping cart.

Click to expand

...

The action bar located at the right of the step is also adapted according to the step height. When the step is collapsed, all the actions are available in a select menu.

All Steps

You can also collapse or expand all the steps at once. For this, Xray provides Expand and Collapse icons on the Test Steps action bar located at the top of the steps.

Manual Steps:

Steps dialog

Grid

Import

Export

+ Add Step

Collapse all steps

1

Action

Go to test item with Id: **2334**.

Data

None

Expected Result

The current stock is 1.

Attachments (0)

2

Action

Add the item to the shopping cart.

Data

None

Expected Result

Shopping cart now displays one **2334** item and no items in stock.

Attachments (0)

3

Action

In the backoffice application, update the stock to 0 on item

Data

None

Expected Result

None

Attachments (0)

4

Action

Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

Data

None

Expected Result

You should get an error message mentioning that there are no more items in stock and the payment was not made.

The item **2334** is removed from the shopping cart.

The user should also be redirected to shopping cart page with a message mentioning the item was removed because there is no stock.

Attachments (0)

+ Add Step

Manual Steps:

Steps dialog

Grid ▾







Import ▾

Export ▾

+ Add Step

Expand all steps

1

Go to test item with Id: **2334**.

2

Add the item to the shopping cart.

3

In the backoffice application, update the stock to 0 on item

4

Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

+ Add Step

 When selecting the **Expand All** or **Collapse All** buttons, a new preference is saved in the user profile. The next time the user enters a Test issue, the last mode (either collapsed or expanded) is applied automatically.

Creating Steps

Add Step button

If there are no steps created, the "+ Add Step" button is positioned within the empty state component. Otherwise, a dedicated "+ Add Step" button is provided on the top and bottom of the steps component so that it is easier to access depending on the user viewport. Pressing this button will create a new step placeholder component always at the end of the list, and the focus is changed for the new step.

Test Details

Type: **Manual**

Manual Steps:

Steps dialog Grid ↗ ↖ ⓘ Import Export **+ Add Step**

1 Go to test item with Id: 2334.

2 Add the item to the shopping cart.

- 3 In the backoffice application, update the stock to 0 on item

- 4 Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

5

Action*

Style ▾

B

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A ▾

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Visual

Text

Data

Enter value...

Expected Result

Enter value...

Add

Cancel

After filling all the desired fields press **Add** to save the changes or **Cancel** for canceling the creation of a new step.

Add in between steps

Hovering in-between steps will reveal the **Add Step** button in order to create a new step in that position. Pressing the button will open the create step component in that position.

▼ Test Details

Type: **Manual**

Manual Steps:

Steps dialog

Grid



Import

Export

+ Add Step

1



Go to test item with Id: 2334.

Add Step

2



Add the item to the shopping cart.

3



In the backoffice application, update the stock to 0 on item

4



Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

+ Add Step

After filling all the desired fields press **Add** to save the changes or **Cancel** to cancel the creation of a new step.



JIRA ISSUE VIEW

After a step is created in the Jira create/edit issue dialog/page, the step is automatically collapsed to save vertical space.

Editing Steps

In order to edit a given step, you just need to press any of the fields in the step. Once a field is clicked, the step view will enter into **editing mode**. There is a clear visual difference between a step that is being edited and steps that are in **reading mode**.

Only **one** step can be in **editing mode** at a given time. Whenever a step goes into editing mode, the current editing step (if any), will go into reading mode automatically.

Once a step is in editing mode, you can change any field within the step.

After filling all the desired fields press **Done** to save the changes or **Cancel** to abort the changes to the step.

If you are creating or editing a step, once you finish filling all the necessary fields within a step, you can press the **Add/Done** button. Depending on the context, this will:

- After the step is saved, the step will change to reading mode.

Whenever a step is saved, a validation occurs to check whether all the **required** steps are filled. In case the validation fails, an error message is displayed focusing on the first required field. In this case, the save operation is aborted and the step will continue in editing mode.

cart.

one 2334 item and no items in stock.

Attachments (0)

3

Action*

Style ▾ B I U A ▾ ↕ ▾ 🔗 🔒 ▾ ☰ ☷ ☹ ▾ + ▾ ⌵

Visual | Text

Data
Enter value...

Expected Result
Enter value...

Add Cancel

↑

4

Action

In the backoffice application,
update the stock to 0 on item

Data
None

Expected Result
None

Please finish creating the step #3
Cannot create the step because it is invalid.

To **delete** attachments, you can just click the **Bin** button that appears when hovering over existing attachments. After clicking the button, you will be prompted with a confirmation message to remove the attachment or not.

↑ 3 ⋮ ↓	Action  In the backoffice application, update the stock to 0 on item	Data None	Expected Result None
	Attachments (1)  README.md ×		    
↑ 4 ⋮ ↓	Action Back in the browser, proceed to checkout. Go through all the steps and confirm the payment	Data None	Expected Result You should get an error message mentioning that there are no more items in stock and

▼ Description

Click to add description

▼ Test Details

Type:

Manual Steps:

Steps dialog

Grid

↗

↖

⌂

Import

Export

+ Add Step

1

Go to test item with Id: 2334.

2

Add the item to the shopping cart.

↑
3
⋮
↓

Action In the backoffice application, update the stock to 0 on item	Data None	Expected Result None
Attachments (1) README.md ×		

Delete Attachment: README.md

i

Are you sure you want to remove this attachment?

Delete

Cancel

Copy to clipboard

You can copy any Test Step field value to the clipboard by hovering over these fields and clicking on the Copy icon next to each highlighted field. If the copy is successful, a confirmation dialog will appear.

↑ 4 ⋮	Action  Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.	Data None	Expected Result  You should get Copy or message mentioning that there are no more items in stock and the payment was not made. The item 2334 is removed from the shopping cart. The user should also be redirected to shopping cart page with a message mentioning the item was removed because there is no stock.	↗ ↗ ⌂ ≡ 🗑
	Attachments (0) 			

Keyboard Navigation

It is possible to navigate between the fields of steps and between different steps using the default **TAB** and **SHIFT+TAB** keyboard keys. When the last step is selected and consequently in edit mode, pressing **TAB** will automatically create a new step at the last position.

It is not possible to navigate outward of a given step where the validation is failing.

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Board

eps Library

formation for your

Description

Click to add description

Test Details

Type: Manual

Manual Steps:

Steps dialog

Grid

↕

↕

ⓘ

Import

Export

+ Add Step

	Action	Data	Expected Result
1	Go to test item with Id: 2334.	None	The current stock is 1.
	Attachments (0)		
2	Add the item to the shopping cart.	None	Shopping cart now displays one 2334 item and no items in stock.
	Attachments (0)		
3	In the backoffice application, update the stock to 0 on item	None	None
	Attachments (0)		
4	Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.	None	You should get an error message mentioning that there are no more items in stock and the payment was not made. The item 2334 is removed from the shopping cart. The user should also be redirected to shopping cart page with a message mentioning the item was removed because there is no stock.
	Attachments (0)		

+ Add Step

Pre-Conditions

This test is not associated with Pre-Conditions yet.

Create Pre-Condition

Associate Pre-Conditions

People

Assignee: Unassign

Reporter: Admin

Votes: 0

Watchers: 1 Stop wa

Dates

Created: Yesterday

Updated: Yesterday

Agile

View on Board

Hipchat discussions

Do you want to discuss this issue?

Connect

Dismiss

Moving Steps

You can move a Test Step within the steps table in one of 3 ways:

- By clicking on the **drag handle** in the first (index) column of each step and dragging the step to the desired position. When dragging a step, you can hover over the space in between steps where a dropdown placeholder will appear. If you drop the step, it will be placed in this position.
- By clicking on the **Up and Down** arrows in each step, also on the first (index) column. This will move the step only one position (Up or Down).
- By clicking on the **"Move To.."** action that appears on the actions menu when hovering the step. This method allows you to directly move a step to a specific position.

Once you move a step, the step is highlighted and the focus placed on the step that was just moved.



Remember that you can also create a step in any position, just by hovering over the space in between steps.

Created:
Updated:

▼ Agile
[View on Bc](#)

▼ Hipchat di:
Do you war
[Connect](#)

1

Action

Go to test item with Id: **2334**.

Data

None

Expected Result

The current stock is 1.

Attachments (0)

2

Action

Add the item to the shopping cart.

Data

None

Expected Result

Shopping cart now displays one **2334** item and no items in stock.

Attachments (0)

3

Action

In the backoffice application, update the stock to 0 on item

Data

None

Expected Result

None

Attachments (0) +

4

Action

Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

Data

None

Expected Result

You should get an error message mentioning that there are no more items in stock and the payment was not made.

The item **2334** is removed from the shopping cart

2

Add the item to the shopping cart.

None

Shopping cart now displays one **2334** item and no items in stock.

Attachments (0)

Step moved successfully

3

In the backoffice application, update the stock to 0 on item

None

None

Attachments (0)

4

Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

None

You should get an error message mentioning that there are no more items in stock and the payment was not made.

The item **2334** is removed from the shopping cart.

The user should also be redirected to shopping cart page with a message mentioning the item was removed because there is no stock.

Attachments (0)

2

Add the item to the shopping cart.

None

Expected Result
Shopping cart now displays one **2334** item and no items in stock.

Attachments (0)

3

In the backoffice application, update the stock to 0 on item

None

Move to...

3

OK Cancel

Attachments (0) +

Move to...

4

Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

None

Expected Result
You should get an error message mentioning that there are no more items in stock and the payment was not made.

The item **2334** is removed from the shopping cart.

The user should also be redirected to shopping cart

JIRA ISSUE VIEW

This action is persisted immediately if you are performing it on the Issue view, and therefore can't be undone.

XRAY STEPS DIALOG JIRA ISSUE DIALOG

If you are on the Jira issue dialog or on the Xray Steps Dialog, this operation is not persisted immediately. Only when you save all steps explicitly or finished editing/creating the issue, the steps are persisted into the datastore.

 The **Move To** menu action is not available on the JIRA ISSUE DIALOG

Cloning Steps

To clone an existing Test step, hover the step and click on the **"Clone"** action that appears on the actions menu located at the right of the step. A confirmation message will appear. Once you confirm, a new step will be created below the cloned step, containing all fields of the cloned step (including attachments).

2



↓

Add the item to the shopping cart.

None

Shopping cart now displays one **2334** item and no items in stock.

Attachments (0)

↑

3



↓

Action 

In the backoffice application, update the stock to 0 on item

Attachments (0) 

Clone Test Step

Are you sure you want to clone this Step from Test STORE-63?

Clone

Cancel







Clone

↑

4



↓

Action

Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

Data

None

Expected Result

You should get an error message mentioning that there are no more items in stock and the payment was not made.

The item **2334** is removed from the shopping cart.

The user should also be redirected to shopping cart

JIRA ISSUE VIEW

This action is persisted immediately if you are performing it on the Issue view and therefore can't be undone.

XRAY STEPS DIALOG JIRA ISSUE DIALOG

If you are on the Jira issue dialog or on the Xray Steps Dialog, this operation is not persisted immediately. Only when you save all steps explicitly or finished editing/creating the issue, the steps are persisted into the datastore.

Deleting Steps

Hovering a step reveals the actions bar to the right of the step. The bottom action for each step contains a **Bin** button for deleting the step. After clicking the button, you will be prompted with a confirmation message to delete the step.

↑	Action	Data	Expected Result
2	Add the item to the shopping cart.	None	Shopping cart now displays one 2334 item and no items in stock.
↓	Attachments (0)		

↑	Action	Data	Expected Result
3	In the backoffice application update the stock to 0 on		
↓	Attachments (0) +		

Delete Test Step

i Are you sure you want to delete this Step from Test STORE-63?

Delete
Cancel

Delete

↑	Action	Data	Expected Result
4	Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.	None	You should get an error message mentioning that there are no more items in stock and the payment was not made. The item 2334 is removed from the shopping cart. The user should also be

JIRA ISSUE VIEW

This action is persisted immediately if you are on performing it on the Issue view and therefore can't be undone.

XRAY STEPS DIALOG

JIRA ISSUE DIALOG

If you are on the Jira issue dialog or on the Xray Steps Dialog, this operation is not persisted immediately. Only when you save all steps explicitly or finished editing/creating the issue, the steps are persisted into the datastore.

View/Edit in Dialog

Besides using the Jira create/edit issue dialog/page and the inline editing capabilities within the issue view, Xray provides a dedicated dialog for viewing and editing the Test steps.

There are two main reasons to use the Xray steps dialog:

- The dialog fills almost the entire screen, therefore, improving the viewing and editing experience of Test Steps.
- You can do any changes to the test steps and save them only when you press the **Save** button and close the dialog. Your Test issue history log will not be filled with intermediate changes to the steps.

In order to open the Steps Dialog view, you can click on the **"View/Edit in Dialog"** button located at the top of the steps, or press the dedicated action button **"Open in Dialog"** within each step. Opening the Steps dialog from the step actions will focus the step automatically on the steps list within the dialog.

▼ Test Details

Type: **Manual**

Manual Steps:

 Steps dialog

 Grid ▼







Import ▼

Export ▼

 Add Step

1



Action

Go to test item with Id: **2334**.

Data

None

Expected Result

The current stock is 1.

↓

Attachments (0)

↑

2



Action

Add the item to the shopping cart.

Data

None

Expected Result

Shopping cart now displays one **2334** item and no items in

▼ Test Details

Type: **Manual**

Manual Steps:

 Steps dialog

 Grid ▼







Import ▼

Export ▼

 Add Step

1



Action 

Go to test item with Id: **2334**.

Data

None

Expected Result 

The current stock is 1.

↓

Attachments (0) 



Open steps dialog

↑

2



Action

Add the item to the shopping cart.

Data

None

Expected Result

Shopping cart now displays one **2334** item and no items in stock.

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A
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D

Jira Software Dashboards Projects Issues Boards Tests **Create** Search

Test Steps dialog

Grid Add Step

Step	Action	Data	Expected Result
1	Go to test item with Id: 2334.	None	The current stock is 1.
2	Add the item to the shopping cart.	None	Shopping cart now displays one 2334 item and no items in stock.
3	In the backoffice application, update the stock to 0 on item	None	None
4	Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.	Enter value...	You should get an error message mentioning that there are no more items in stock and the payment was not made. The item 2334 is removed from the shopping cart. The user should also be redirected to shopping cart page with a message mentioning the item was removed because there is no stock.

Done Cancel

Save Cancel

Import Steps

Test Steps can be imported from sources such as:

- Test
- CSV
- JSON
- Clipboard

In order to import steps, press the **Import** button located at the top of the test steps, in the actions bar. A dropdown list with all the import options will appear:

▼ Test Details

Type:

Manual

Manual Steps:

Steps dialog

Grid ▼

ⓘ

Import ▼

Export ▼

+ Add Step

1	Action	Data	Expected Result
	Go to test item with Id: 2334 .	None	Current stock is 1.
↓	Attachments (0)		
↑	Action	Data	Expected Result
2	Add the item to the shopping cart	None	Shopping cart now displays one 2334 item and no items in

Choose the desired option.

From Test

This feature allows you to import existing steps from other Test issues.

After choosing the "Import From Test" option, a popup dialog will be displayed that will guide the user through the import process.

Step #1

In the first screen, the user can **select(or search)** an existing Test issue using the issue picker field.

Once a Test is selected, the steps from the Test will be displayed in a table below where the user can select **all steps or just cherry-pick the steps** that they need to import.

There is also an option to **Reset the Current Steps** at the bottom of the dialog. Checking this option will delete all steps that are already present in the Test when importing the new steps.

After the desired steps are selected, press **Next**.

Import Steps - Test

Test Issue STORE-42 - [e2e] Order ch...

✓	Rank	Action	Data	Expected Result	#Attachments
✓	1	Add the following items into the basket.	• Item 413 • Item 133 • Item 97 • Item 923 • Item 189	After each item is added, a confirmation message appears mentioning the item was added to the basket.	-
✓	2	Click on the basket icon located on the top right toolbar of the app.		The basket page is displayed containing all 5 items.	-
✓	3	Press the Checkout button to start the checkout process.		The checkout process is initiated asking the user the address details.	-
✓	4	Fill all the address details.	Street: 1414 Kessla Way City: Charleston State: SC State Full: South Carolina Zip Code: 29424 Phone Number: 843-364-7548 Mobile Number: 843-276-9247	The next step in the process is displayed which is the payment details.	-
✓	5	Fill the payment details and click on finish.	Credit Card Type: Visa Credit Card Number: 4556609445104357 Credit Card Generator: CVV2374 Expires: 05/2021	A confirmation message with the order number is displayed.	-
✓	6	Click on the order list and enter the order number from the last step on the search field.		The order should be displayed as the only item on the order list.	-
✓	7	Click on the order list and enter the order number from the last step on the search field.		The order should be displayed as the only item on the order list.	-
✓	8	Click on the order line.		The order details page must be displayed containing all the order items and the status of the order.	-
✓	9	Click on the Execute order button.		The order status must now be Processing .	-
✓	10	Execute the following database script.	<pre>SELECT * FROM ORDERS WHERE ID = <ORDER_ID></pre>	This must return the database order row with the following information: • Status: "PROCESSING" • Source: "Backoffice"	-
✓	11	Execute the following request.	<ORDER_ID>	The following response must be returned:	-

☐ Reset Current Test Steps

Next

[Back](#)

Cancel

Step #2

This step will allow the user to map between the **source** fields (of the Test issue being imported) and the **target** fields (of the current Test issue).

All **required** fields must be mapped before proceeding to the next (and final) step in the import wizard. If any required field is not mapped, the **Validate** button will be disabled. Required fields are signaled with an (*).

Import Steps - Test

Source Custom Fields		Target Custom Fields
Action (e.g Add the following items into the basket.)	→	Action* ▼
Data (e.g * Item 413 * Item 133 * Item 97 * Item 923 * Item 189)	→	Data ▼
Expected Result (e.g After each item is added, a confirmation message appears mentioning the item was added to the basket.)	→	Don't map this field ▼

Validate Back Cancel

Step #3

The third screen is the validation step. If all steps are validated, the user can proceed with the import. The validation process will verify that the **field types** match. If there are any validation error messages, you can just navigate back to the previous step and fix the mappings, or cancel the import.

Import Steps - Test

✓ **No problems were found while validating the steps** X
The validation process didn't find any problems with the steps you wish to import. Please click the import button to finish the import process.

Import Steps Back Cancel

After pressing "**Import Steps**," the steps are imported into the current issue and the issue page is refreshed.

From CSV

This feature allows you to import existing steps from an external CSV file.

After choosing the "**Import From CSV**" option, a popup dialog will be displayed that will guide the user through the import process.

Step #1

The first screen allows the user to define the following parameters:

- **CSV file** that they want to import the steps from
- **CSV Delimiter**: defines the delimiter that is going to be used to separate step fields.
- **List Value Delimiter**: defines the delimiter character used to separate multi-value fields such as select lists and radio buttons.
- **Date Format**: Defines the date format when importing date custom test step fields.
- **Date Time Format**: Defines the date and time format when importing date custom test step fields.
- **Contains Header**: defines if the CSV file contains the header with the field names or not

- **Reset Current Test Steps:** defines if the user wants to override the steps already present in the Test.

Once all parameters are configured, press **Next**.

Import Steps - CSV

CSV File CALC-4915.csv

The maximum file upload size is 10,00 MB.

Contains Header ☒

When this option is selected the header is not included in the list of steps to import.

File Encoding

CSV Delimiter

List Delimiter

Date Format

Please use a Date Format with syntax valid for [SimpleDateFormat](#)

Date Time Format

Please use a Date Time Format with syntax valid for [SimpleDateFormat](#)

☒ Reset Current Test Steps

Step #2

In this step, you need to **map** the columns of the CSV file with the Test Steps fields.

All **required** fields must be mapped before proceeding to the next (and final) step in the import wizard. If any required field is not mapped, the **Validate** button will be disabled. Required fields are signaled with an (*).

Import Steps - CSV

Source Custom Fields

Target Custom Fields

Step
(e.g Enter first value)



Data
(e.g 10)



Expected Result
(e.g Calculator displays 10)



CPU Temperature
(e.g 15)



Scientific Mode
(e.g true)



Try it

Example of CSV contained Step, Data, (Expected) Result fields, a number, and a toggle Test Step custom fields, delimited by comma. It also contains the header that should be ignored whenever importing: [example_csv_cf.csv](#).

Step #3

The third screen is the validation step. If all steps are valid, the user can proceed with the import. The validation process will verify that the **field types** match the CSV values provided. If there are any validation error messages, you can just navigate back to the previous step and fix the mappings, or cancel the import.

Import Steps - CSV

 **No problems were found while validating the steps**

The validation process didn't find any problems with the steps you wish to import. Please click the import button to finish the import process.



Import Steps

Back

Cancel

After pressing "**Import Steps**" the steps are imported into the current issue, and the issue page is refreshed.

From JSON

The import from JSON dialog allows you to specify which **file** you want to import the steps from, the **date** and the **date time** format, and provides a checkbox if you want to override the steps already present in the Test.

Import Steps - JSON

 Before importing, the JSON will be validated. In case of error, a message will be shown.



File

Browse...

No file selected.

The maximum file upload size is 10,00 MB.

Date Format

dd/MM/yyyy

Please use a Date Format with syntax valid for [SimpleDateFormat](#)

Date Time Format

dd/MM/yyyy HH:mm

Please use a Date Time Format with syntax valid for [SimpleDateFormat](#)

☐ Reset Current Test Steps

Import Steps

Cancel

The JSON file should be an array of step objects. The objects should have the field **step**, the required **Test Step Custom Fields**, and can optionally have the fields **data**, **expected result**, and **attachments**. Below is an example of a valid file:

Example Json

[illegible]

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```

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      "Option B"
    ],
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  }
}
]

"Toggle": "true",
"

```

From Clipboard

The import from the clipboard allows you to copy the steps from Excel or CSV and paste them directly into Test cases in Xray.

After choosing the **"Import From Clipboard"** option, a popup dialog will be displayed that will guide the user through the import process.

Step #1

The first screen allows the user to define the following parameters:

- **Contains Header:** defines if the clipboard content contains the header with the field names or not
- **CSV Delimiter:** defines the delimiter that is going to be used to separate step fields. Here you can also choose to use the **Excel default** in case you are copying from Excel.
- **List Value Delimiter:** defines the delimiter character used to separate multi-value fields such as select lists and radio buttons.
- **Date Format:** Defines the date format when importing date custom test step fields.
- **Date Time Format:** Defines the date and time format when importing date custom test step fields.
- **Reset Current Test Steps:** defines if the user wants to override the steps already present in the Test.

Import Steps - Clipboard

Copy and paste the excel or csv steps here by pressing cmd + v

Contains Header

☒

When this option is selected the header is not included in the list of steps to import.

CSV Delimiter

\t

Excel Default

List Delimiter

;

Date Format

dd/MM/yyyy

Please use a Date Format with syntax valid for [SimpleDateFormat](#)

Date Time Format

dd/MM/yyyy HH:mm

Please use a Date Time Format with syntax valid for [SimpleDateFormat](#)

☐ Reset Current Test Steps

Next

Back

Cancel

After the steps are pasted in the dialog, it will display the previous version of the steps in the same dialog.

Import Steps - Clipboard

Step	Data	Expected Result
Navigate to manual Test issue		The Test page is displayed and available
Verify the notification message regarding the tour of the new UI or the on-boarding icon button		The message and button are available
Click in the link of the message "Take Tour"		The user is redirected to the tour and the bigger dialog is prompt to the user
Verify that a purple message is displayed explaining a specific functionality and a button to follow further		A purple message is displayed explaining a specific functionality and a button to follow further
Go further and back in the explanations steps		The user can go further and back in all parts of the process tour
Go to the final step of the tour and verify that a "Finish" button is available		A "Finish" button is available
Click in it		The user is prompted out of the tour
Navigate to the Jira entity properties and verify that the state of the on-boarding is saved in the user preferences		The state of the on-boarding is saved in the user preferences

Contains Header

☒

When this option is selected the header is not included in the list of steps to import.

CSV Delimiter

\t

Excel Default

List Delimiter

;

Date Format

dd/MM/yyyy

Please use a Date Format with syntax valid for [SimpleDateFormat](#)

Date Time Format

dd/MM/yyyy HH:mm

Please use a Date Time Format with syntax valid for [SimpleDateFormat](#)

☐ Reset Current Test Steps

Next

Back

Cancel

Step #2

In this step, you need to **map** the columns pasted from the clipboard with the Test Steps fields.

All **required** fields must be mapped before proceeding to the next (and final) step in the import wizard. If any required field is not mapped, the **Validate** button will be disabled. Required fields are signaled with an (*).

The screenshot shows a dialog box titled "Import Steps - Clipboard". It contains two columns: "Source Custom Fields" and "Target Custom Fields".

Source Custom Fields		Target Custom Fields
Step (e.g Navigate to manual Test issue)	→	Action*
Data (e.g None)	→	Data
Expected Result (e.g The Test page is displayed and available)	→	Expected Result

At the bottom right, there are three buttons: "Validate" (highlighted in blue), "Back", and "Cancel".

Step #3

The third screen is the validation step. If all steps are valid, the user can proceed with the import. The validation process will verify that the **field types** match with the pasted values. If there are any validation error messages, you can just navigate back to the previous step and fix the mappings, or cancel the import.

The screenshot shows the same "Import Steps - Clipboard" dialog box, but now it displays a green success message box at the top:

✔ **No problems were found while validating the steps**
The validation process didn't find any problems with the steps you wish to import. Please click the import button to finish the import process.

At the bottom right, the buttons are "Import Steps" (highlighted in blue), "Back", and "Cancel".

After pressing "**Import Steps**" the steps are imported into the current issue, and the issue page is refreshed.

Export Steps to CSV

Manual Test Steps can be exported to CSV by clicking the "**Export > To CSV**" button located above the steps.

▼ Test Details

Type: **Manual**

Manual Steps:

Steps dialog

Grid ▼

↶

↷

ⓘ

Import ▼

Export ▼

To CSV...

+ Add Step

1	Action	Data	Expected Result
	Go to test item with Id: 2334 .	None	The current stock is 1.
↓	Attachments (0)		
↑	Action	Data	Expected Result
2	Add the item to the shopping cart.	None	Shopping cart now displays 2 items and the total is 2.000000.

After clicking the action button, the following dialog will pop up.

Grid ▼

↶

↷

ⓘ

Import ▼

Export ▼

To CSV...

+ Add Step

Export STORE-63 steps to CSV

CSV Delimiter

List Value Delimiter

;

Date Format

dd/MM/yyyy

Date Time Format

dd/MM/yyyy HH:mm

☐ Attachment links

By selecting this option the csv file will include the Jira links to attachments

Export

Cancel

Here you can configure some options in order to export the steps into a CSV file:

- **CSV Delimiter:** defines the delimiter that is going to be used to separate step fields.
- **List Value Delimiter:** defines the delimiter character used to separate multi-value fields such as select lists and radio buttons.
- **Date Format:** Defines the date format when exporting date custom test step fields.
- **Date Time Format:** Defines the date and time format when exporting date custom test step fields.
- **Attachment Links:** When this option is selected, the attachments column on the CSV will contain links to Jira attachments.

Export Steps into XML, Word, Printable

In order to use the default Jira export capabilities to export the Test Steps along with the issue content, the **Manual Test Steps** custom field needs to be included on the **View Issue Screen** (of the Test issue). Because Xray provides a dedicated web panel on the issue, this custom field is not necessary in the Jira issue view for Test cases. Therefore, by default, the **Manual Test Steps** custom field is not included in this view.

Hence, if you need to include the Test Steps when using the native Jira export actions for the Test issues, please include this custom field on the screen. The **Manual Test Steps** custom field does not present any relevant information regarding the Test Steps when it is included on the issue view. A **"Printable Field"** label is displayed instead, indicating that the custom field is on the screen and will provide the Test Steps when exported to XML, Word, or Printable formats.

 Book Store / STORE-42

[e2e] Order checkout process

EditCommentAssignMore▼To DoIn ProgressDoneAdmin▼

Details

Type:Test

Priority:Medium

Affects Version/s:None

Component/s:None

Labels:None

Manual Test Steps:PRINTABLE FIELD

Status:TO DO (View Workflow)

Resolution:Unresolved

Fix Version/s:None

Description

Click to add description

Test Details

Type:Manual

Manual Steps:

Steps dialogGrid▼↗↖ⓘ

Import▼Export▼+ Add Step

1

Action

Add the following items into the basket.

Data

- Item 413
- Item 133
- Item 97
- Item 923
- Item 189

Expected Result

After each item is added, a confirmation message appears mentioning the item was added to the basket.

Attachments (0)

2

Action

Click on the basket icon located on the top right toolbar of the app.

Data

None

Expected Result

The basket page is displayed containing all 5 items.

For more information about exporting manual Tests in bulk, please visit [Export Tests using JIRA built-in features](#).

