

Exporting Test Cases

- [Introduction](#)
- [Export Test Cases to Excel](#)
- [Export Test Cases to PDF](#)
- [Export Test Cases to Word](#)

Introduction

QMetry allows its users to export test cases out of QMetry in Excel, Word and PDF.

Use Case: Exporting test cases to Excel gives a tabular view of test case details and excel is used for re-import the test cases into QMetry. Exporting test cases to PDF/Word is useful for sharing assets in a printable format with users outside QMetry.

→ **Required Permissions:** Users should have the “Export” permission of the Test Case module to export test cases. Role-based user access control for the module is managed under **Customization**
➤ **Roles.** If the role assigned to the user does not have right to export test cases, the Export option will appear in the disabled mode for that user.

You can export details of test assets in XLSX, CSV, Word and PDF.

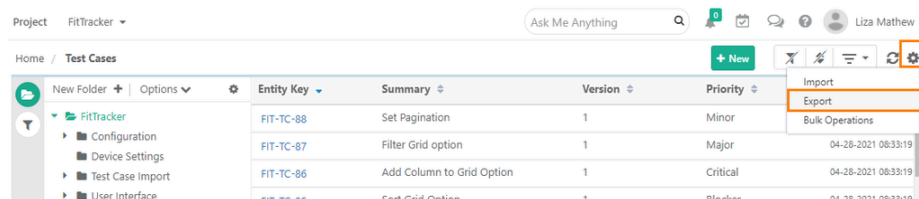
Export Test Cases to Excel

Steps:

1. Go to the **Test Case** module.
2. Select the folder on the tree.
3. The content on grid pane at the right depends on the folder that you selected on the tree. The grid pane at right displays test case records for the folder.

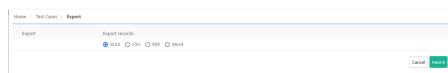
You can apply Filter criteria to test case records to export only preferred test cases.

4. Click on the cog icon  at the top right corner on the toolbar and select **Export**.



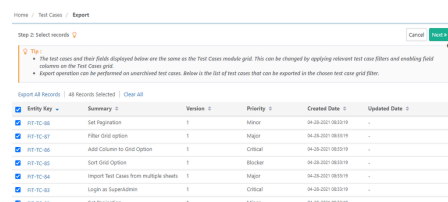
The next screen opens to select the format to export the test assets.

5. Select from **XLSX / CSV** and click **Next**.



6. **Select records:** Select test cases you want to export by selecting individual test cases. Once you are done with selecting test cases, click **Next**.

- **Export All Records:** Click on the **Export All Records** link to select all the records across pages to export.



7. Test Case Export Options

Select options to export test case:

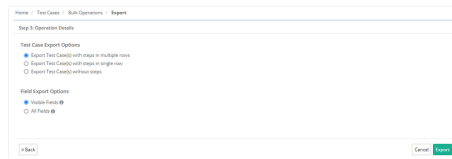
Test Case Export Options

- Export Test Cases with steps in multiple rows: It will export test cases with steps arranged in multiple rows of excel sheet.
- Export Test Cases with steps in single row: It will export test cases with steps included in a single cell.
- Export Test Cases without Steps: It will export test cases without steps.

Field Export Options

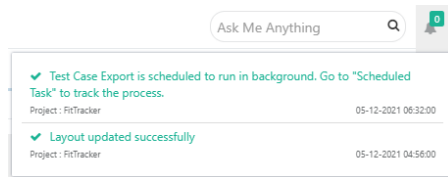
- **Visible Fields:** Select the option to export only visible fields on the List view screen. The export will exclude the columns which are hidden;
Note : The test case description and step description fields are included in the export irrespective of any field export options.
- **All Fields:** Select the option to export all the fields irrespective of whether the columns are visible or hidden.

8. Click **Export**.

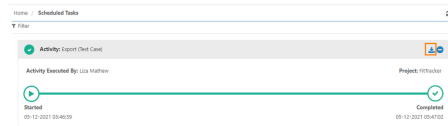


The confirmation window pops up. Click "Yes" to proceed.

A message pops up to view notifications for the export progress. You can view the progress in the notification window on the application header. This allows scheduled exports to run in the background and allows users to continue with their other work.



To download the xls/csv file, go to the Scheduled Tasks section.



Refer to [Notification Window for Export Progress](#) for more details.

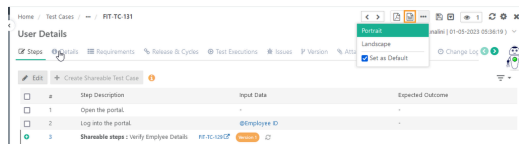
Export Test Cases to PDF

You can export a single test case as well as bulk test cases to PDF.

Export a Single Test Case to PDF

Open the test case details page. To export the test case detail to PDF, click on the **PDF** icon on the header. The page orientation will be Portrait by default. You can select the page orientation Portrait or Landscape and also set it as the default page orientation for every PDF/Word export.

– **Required Permissions:** Users with the "View" permission for the Report module and "Export" permission for the Test Case module can export a single test case to PDF. The PDF icon is visible to the users with the required permissions. Role-based user access control for the module is managed under Customization > Roles.



The PDF containing the test asset details is downloaded.

eSignature feature: If the eSignature feature is enabled for project, then the report also includes Approval Workflow details for the test case.

Export Test Cases in Bulk to PDF

Users can export bulk test cases to PDF.

The feature enables users to export test cases into PDF, which makes it easy for users to print and store the test case details in hard copies. It saves users time in exporting individual test cases into PDF.

You can sort test cases in the required order before bulk exporting them to a PDF.

1. Go to the Test Cases module.
2. Click on the cog icon on the toolbar and select Export.

Entity Key	Summary	Version	Priority	Created Date	Updated Date
FIT-TC-1	Set Up Login Screen	1	Major	04-28-2021 08:33:19	-
FIT-TC-2	Calculator Input Calculator	1	Critical	04-28-2021 08:33:19	-
FIT-TC-3	Heartbeat rate	1	Major	04-28-2021 08:33:19	-
FIT-TC-4	Set device to walk mode	1	Critical	04-28-2021 08:33:19	-
FIT-TC-5	Set device to Run mode	1	Critical	04-28-2021 08:33:19	-

3. Select the PDF option and page orientation Portrait or Landscape.

4. Click **Next**.

Home / Test Cases / Export

Export records

Report

☐ HTML
 ☐ PDF
 ☐ Word

Cancel **Next**

5. Select test cases you want to export the details of. Make sure you sort the records as per your requirement to display them on the PDF.

- **Select All:** Select the option to select all the test cases across pages. Maximum 50 test cases can be selected at a time.

6. Click **Export**.

Home / Test Cases / Export

Step 2: Select records

Cancel **Export**

Tip :

- The test cases and their fields displayed below are the same as the Test Cases module grid. This can be changed by applying relevant test case filters and enabling field columns on the Test Cases grid.
- Export operation can be performed on unarchived test cases. Below is the list of test cases that can be exported in the chosen test case grid filter.

☒ Select All (Across Pages) | This will select Max. 50 Records | 48 Records Selected | [Clear All](#)

<input checked="" type="checkbox"/>	Entity Key	Summary	Version	Priority	Created Date	Updated Date
<input checked="" type="checkbox"/>	FIT-TC-88	Set Pagination	1	Minor	04-28-2021 08:33:19	-
<input checked="" type="checkbox"/>	FIT-TC-87	Filter Grid option	1	Major	04-28-2021 08:33:19	-
<input checked="" type="checkbox"/>	FIT-TC-86	Add Column to Grid Option	1	Critical	04-28-2021 08:33:19	-
<input checked="" type="checkbox"/>	FIT-TC-85	Sort Grid Option	1	Blocker	04-28-2021 08:33:19	-
<input checked="" type="checkbox"/>	FIT-TC-84	Import Test Cases from multiple sheets	1	Major	04-28-2021 08:33:19	-
<input checked="" type="checkbox"/>	FIT-TC-83	Login as SuperAdmin	1	Critical	04-28-2021 08:33:19	-

A confirmation message pops up. Click Yes to proceed.



Confirm

You have selected 48 test case(s). Are you sure you want to export to a PDF file?

7. To export the PDF, go to Scheduled Tasks.

You can download the PDF from Scheduled Tasks section.

Home / Scheduled Tasks

Filter

Activity: Export (Test Case)

Activity Executed By: Lisa Mathew

Project: HRMaster

Started: 09-12-2021 09:46:58

Completed: 09-12-2021 09:47:58

Export Test Cases to Word

You can export a single test case as well as bulk test cases to Word.

Export a Single Test Case to Word

Open the test case detail page. To export the test case details to Word, click on the **Word** icon on the header. By default, the page orientation will be Portrait. You can select the page orientation Portrait or Landscape and also set it as the default page orientation for every PDF/Word export.

→ **Required Permissions:** Users with the "View" permission for the Report module and "Export" permission for the Test Case module can export a single test case to Word. The **Word** icon is visible to the users with the required permissions. Role-based user access control for the module is managed under Customization > Roles.

/ **FIT-TC-131**

Requirements Release & Cycles Test Executions Issues Version Attachments

Portrait
Landscape
☒ Set as Default

Shareable Test Case ⓘ

Description	Input Data	Expected Outcome
Log in the portal.	-	-
Log into the portal.	@Employee ID	-

Testable steps : Verify Employee Details [FIT-TC-129](#) Version 1

Home / Test Cases / Export

Export records Orientation

☐ XLSX ☐ CSV ☐ PDF ☒ Word ☒ Portrait ☐ Landscape

The Word file containing the test asset details is downloaded.

→ **eSignature feature:** If the eSignature feature is enabled for project, then the report also includes Approval Workflow details for the test case.

Export Test Cases in Bulk to Word

Users can export bulk test cases to Word.

Use Case: QA teams share the test case details with support or other teams, who do not have access to QMetry, to get their feedback. Members of the support or other teams provide their comments in the Word or edit to make necessary changes before sharing ahead.

You can sort test cases in the required order before bulk exporting them to a Word.

Steps:

1. Go to the Test Cases module.
2. Click on the cog icon on the toolbar and select **Export**.

Options	Entity Key	Summary	Version	Priority	Created Date
on	FIT-TC-1	Verify Login Details	1	Major	06-30-2020 02:56
ings	FIT-TC-2	Calories Burnt Calculator	2	Critical	05-09-2021 07:10:33
n Excel	FIT-TC-3	Heartbeat rate	1	Major	10-06-2020 00:57:25
Report	FIT-TC-4	Set device to walk mode	1	Critical	10-06-2020 00:58:03
ice	FIT-TC-5	Set device to Run mode	2	Critical	10-07-2020 02:38:17
	FIT-TC-6	Set device to Exercise mode	1	Critical	10-06-2020 01:21:55

3. Select the Word option and page orientation Portrait or Landscape.

4. Click **Next**.

Home / Test Cases / Export

Export records Orientation

☐ XLSX ☐ CSV ☐ PDF ☒ Word ☒ Portrait ☐ Landscape

5. Select the test cases you want to export the details of. Make sure you sort the records as per your requirement to display them in the Word file.

- **Select All:** Select the option to select all the test cases across pages. Maximum 50 test cases can be selected at a time.

6. Click **Export**.

Step 2: Select records

Cancel

Export

Tip :

- The test cases and their fields displayed below are the same as the Test Cases module grid. This can be changed by applying relevant test case filters and enabling field columns on the Test Cases grid.
- Export operation can be performed on unarchived test cases. Below is the list of test cases that can be exported from the test case grid filtered records.

☐ Select All (Across Pages) | 8 Records Selected | [Clear All](#)

<input type="checkbox"/> Entity Key ^	Summary ^	Version ^	Priority ^	Created Date ^	Created By ^	Updated By ^	Status ^
<input checked="" type="checkbox"/> FIT-TC-1	Verify Login Details	1	Major	06-30-2020 02:56:00	mrunalini (mrunalini)	mrunalini (mrunalini)	New
<input checked="" type="checkbox"/> FIT-TC-2	Calories Burnt Calculator	2	Critical	05-09-2021 07:10:33	mrunalini (mrunalini)	mrunalini (mrunalini)	In Progress
<input checked="" type="checkbox"/> FIT-TC-3	Heartbeat rate	1	Major	10-06-2020 00:57:25	mrunalini (mrunalini)	mrunalini (mrunalini)	New
<input checked="" type="checkbox"/> FIT-TC-4	Set device to walk mode	1	Critical	10-06-2020 00:58:03	mrunalini (mrunalini)	mrunalini (mrunalini)	Open

A confirmation message pops up. Click Yes to proceed.

7. To download the Word file, go to Scheduled Tasks.

You can download the Word file from the Scheduled Tasks section.



Filter

Activity: Export (Test Case)

Activity Executed By: Liza Mathew

Project: FitTracker

Started

04-06-2023 06:20:08

Completed

04-06-2023 06:20:09

A confirmation message pops up. Click Yes to proceed.

7. To download the Word file, go to Scheduled Tasks.

You can download the Word file from the Scheduled Tasks section.