



Review management

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1. Overview

Zoho QEngine offers a streamlined test approval process for your [test cases](#), allowing you and your [team](#) to collaborate effectively with a few simple steps.

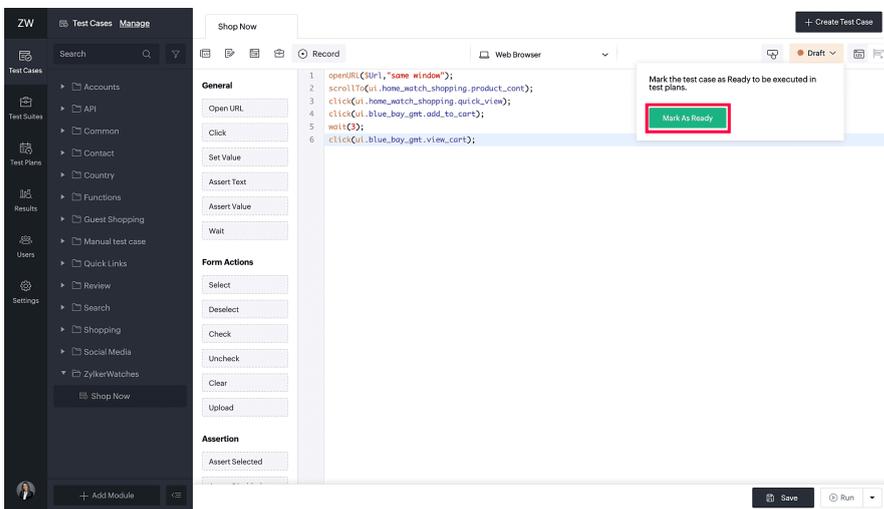
Let's look at an example scenario to understand this better. Consider a project team working on a shopping application: the testers create test cases, tailored to test specific features and functionalities of the shopping app. These test cases undergo review by the manager or team lead to ensure they are comprehensive, cover all possible scenarios, and meet the testing requirements. Here, the tester is the requester, and the manager or team lead serves as the approver for the test cases. Once the test case has been reviewed and any necessary changes have been

made, the manager or team lead approves the test case. Through this, the team can better analyze their work and solve the issues systematically, from its root cause.

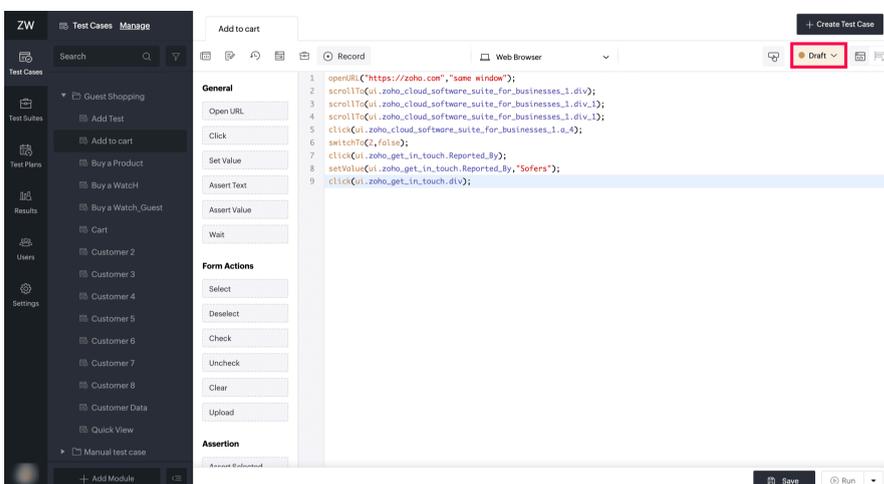
Additionally, Zoho QEngine facilitates a more efficient approval workflow by empowering users to conduct bulk requests and approvals of test cases within a module. This functionality expedites the review process, allowing the team to have a flexible and efficient approach to the test case approval process.

1.1. Test Case Status

Statuses are maintained for all test cases irrespective of whether it goes through a review process or not. To automate the execution of test cases, they are added to [test plans](#). Initially, all the test cases will be in the **draft** state. For them to be added to a test plan, they will have to attain the **ready** state. Users can directly mark the test case as **ready** from the **draft** status if an approval process is not in place.

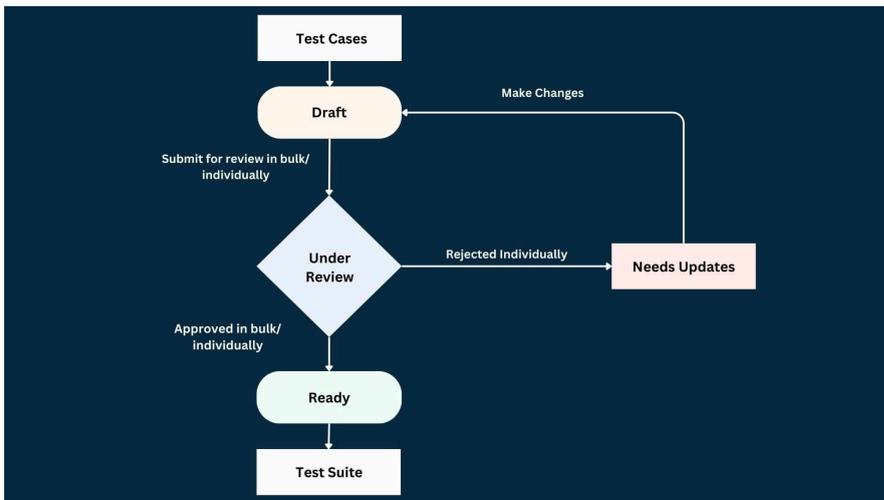


With the review process in place, Zoho QEngine maintains two additional statuses for test cases, providing users visibility into the current state of the review. Test case states evolve depending on their position in the review workflow.



- **Draft** - Test cases are initially in the draft state and remain so until the approver marks the test cases as ready.
- **Under Review/ Review** - Test cases enter the review state once the approval workflow is initiated by the requester.
- **Needs Updates** - Test cases enter this state if the approver rejects them and requests revisions.
- **Ready** - Test cases transition to this state once the approver accepts them.

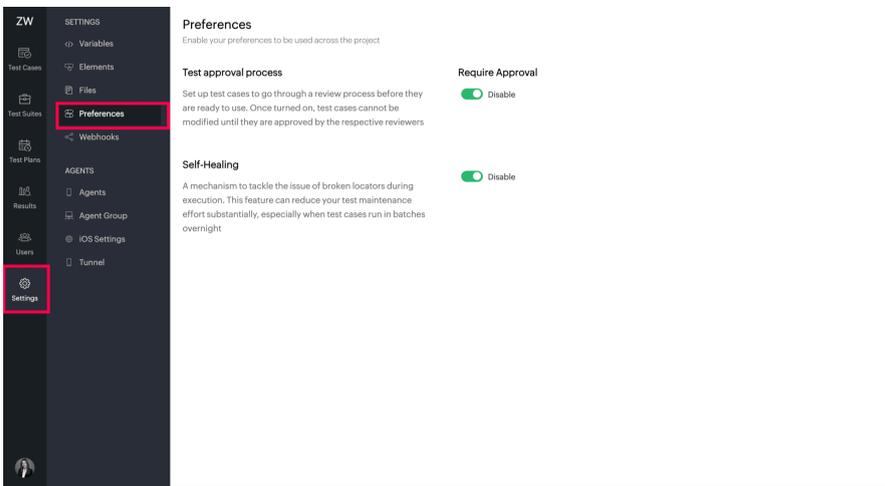
2. Flow Diagram



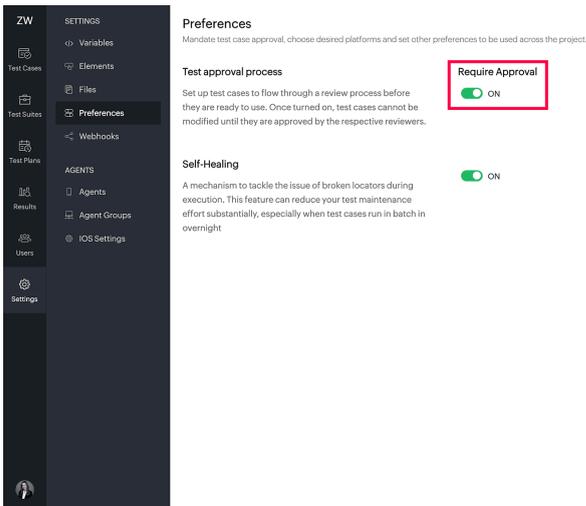
3. Setting up for the approval process

Test cases in [projects](#) need streamlined development, and undergoing a review process is desirable for any team. Here, reviewers such as the super admin, admin, or manager need to enable the approval process. Follow the steps below to set up the review process:

1. Navigate to **Preferences** under **Settings**.



2. Toggle on the **Require Approval** to enable the **Test approval process**.



The test cases in this project must now all go through an approval process by a project's manager, the portal's super admin, or an admin for it to be marked as **ready**. [Learn more about roles and permissions](#)

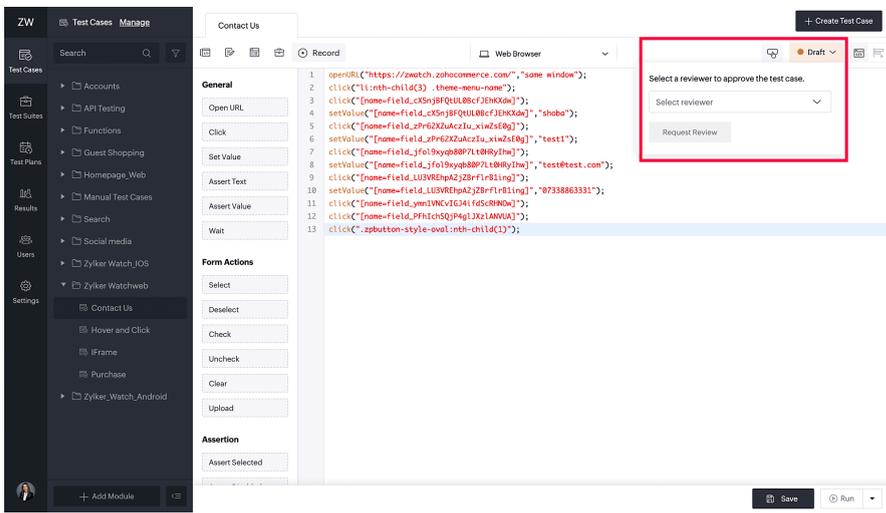
4. Test case approval process

4.1 Submit test cases for approval

Testers can either send their test cases individually for approval or submit all the test cases within a module at once. Follow the steps below to request for approval.

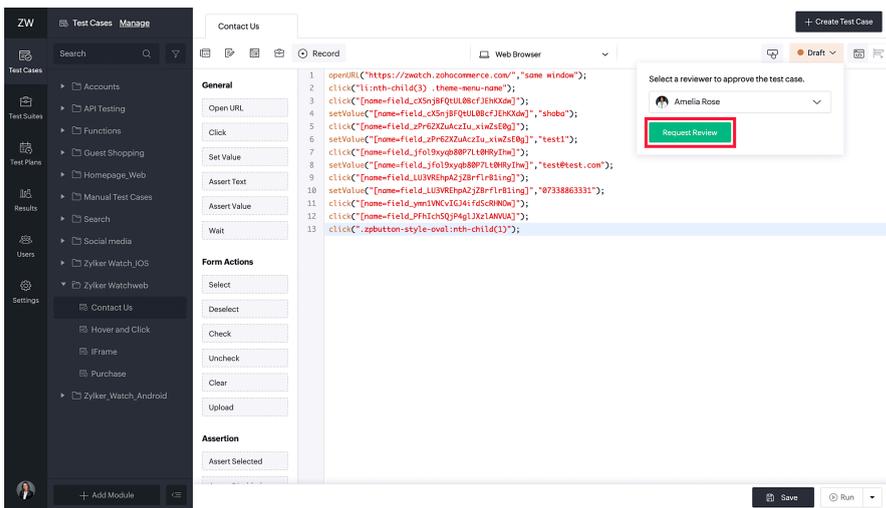
4.1.1. Submitting individual test case for approval

1. Click on the status dropdown in the top-right corner.

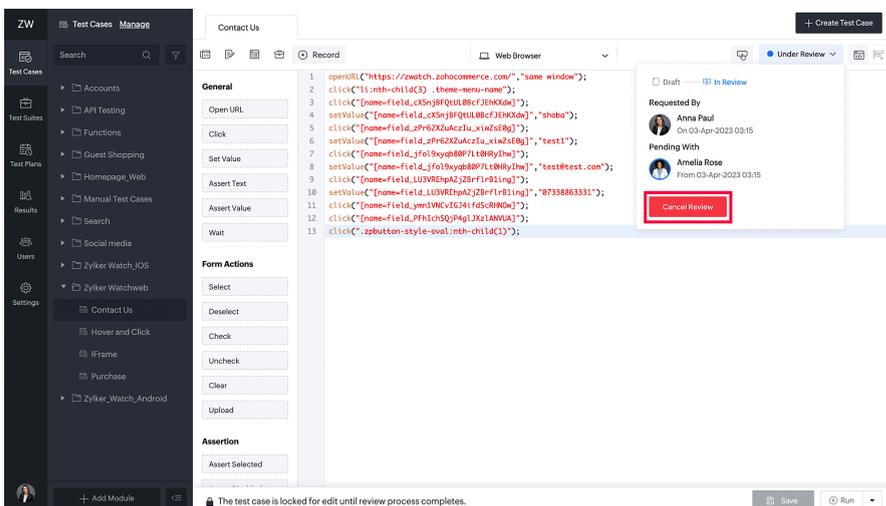


Note: A reviewer can be the project manager, the super admin, or an admin. [Learn more](#)

2. Choose the reviewer, and click **Request Review**. The dropdown will automatically list all the [authorized reviewers](#) to select from.



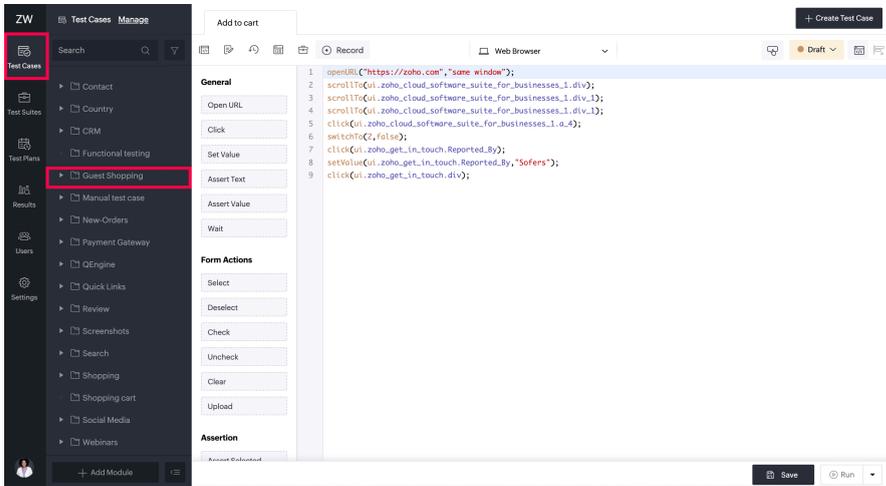
Once the request is sent for review, the status of the test case changes to **Under Review**. If you want to revoke the review, click on **Cancel Review**. This notifies the reviewer through email.



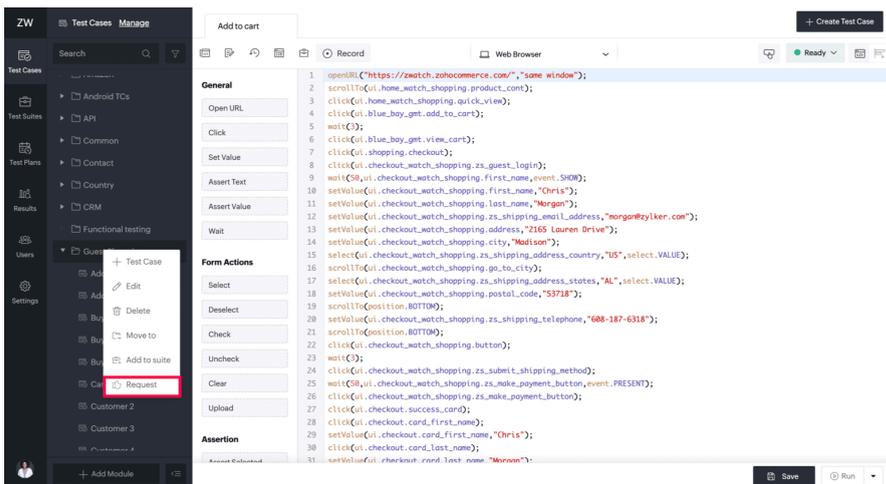
4.1.2. Submitting test cases in modules for approval

Alternatively, if the tester wants to submit multiple test cases for approval, they can do so by sending the test cases within a module collectively.

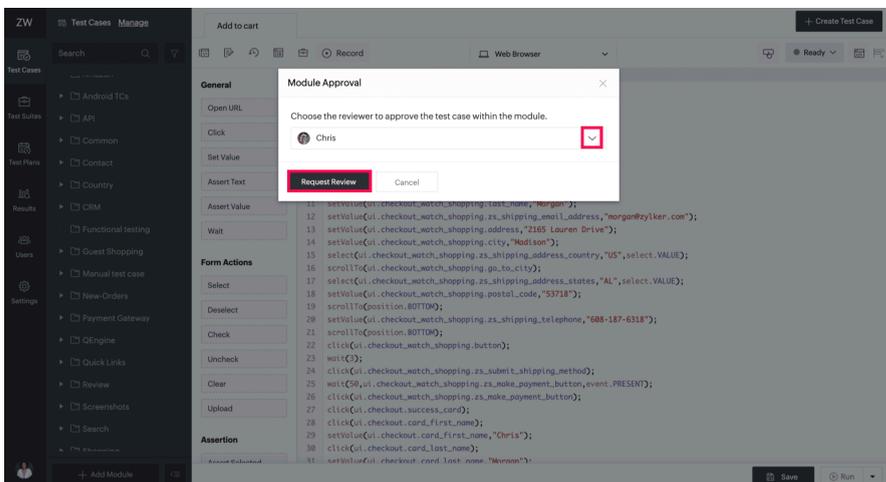
1. Right-click on the module with the test cases that need to be requested for approval.



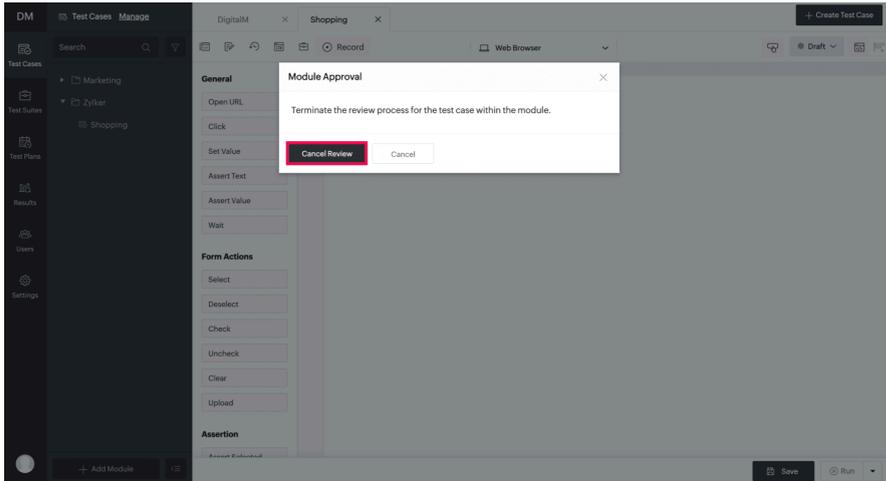
2. Click on **Request** to initiate approval.



3. Select the reviewer you want to request approval from and click **Request Review**.



The status of all the test cases sent for approval will change to **Under Review**. If you want to abort the approval request, click **Terminate Review**.



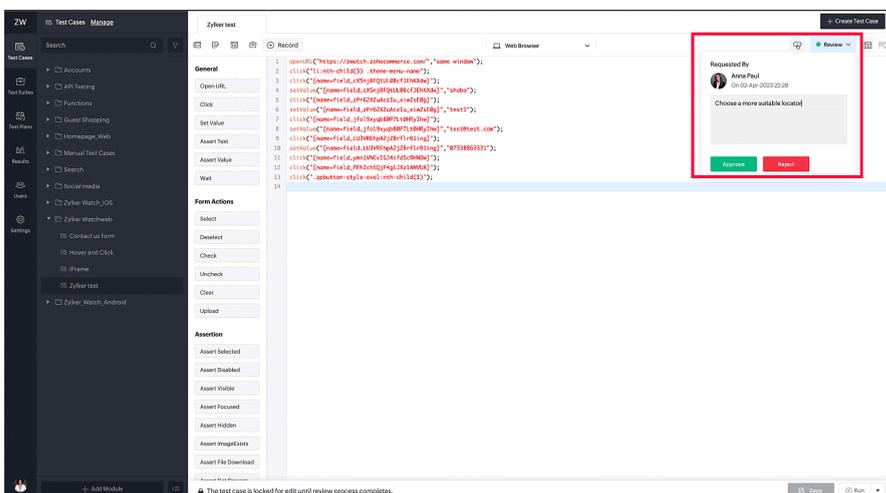
The test cases are now locked, and can't be edited until the reviewer initiates changes or approves them. If changes are initiated, the test cases status changes to draft, allowing the necessary edits to be made. Additionally, if the test cases are in the ready state, further edits can be made as needed, and a new review process can be requested. An email will be sent to the reviewer to inform them of the approval request.

4.2. Approve or Reject test cases

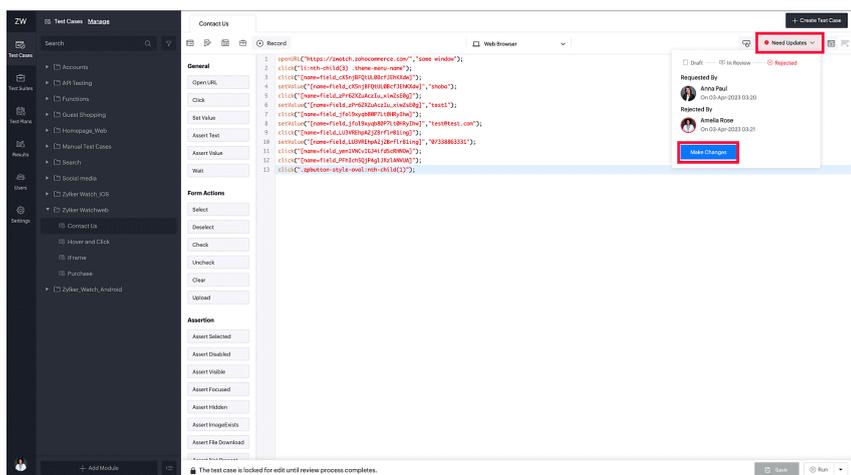
The Super Admin/ Admin/ Manager receives requests for test case approval either for an individual test case or in bulk for a module. They have the option to approve them individually or collectively. Follow the steps below to approve test cases.

4.2.1. Approve or Reject individual test case

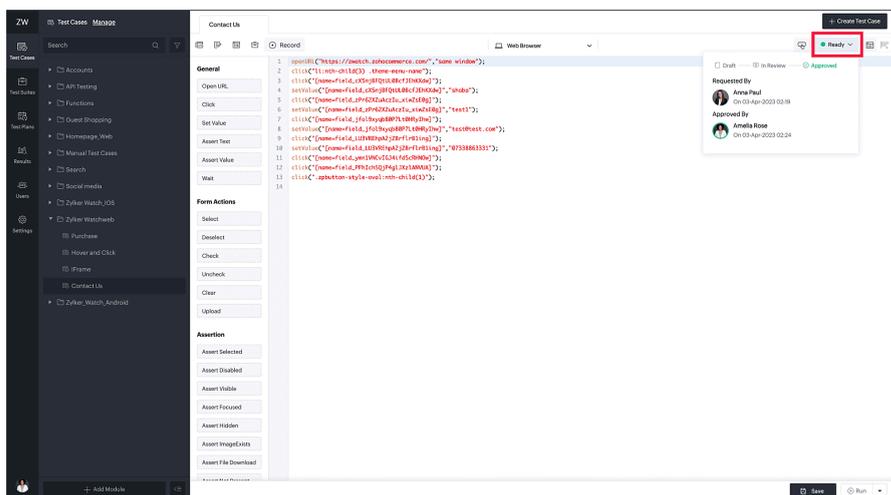
1. Click on the dropdown next to the **Review** status to review the test case. Here, the reviewer has to **Approve** or **Reject** the test cases. Additionally, they can leave comments to ask questions or make suggestions.



- If the reviewer rejects the test case, the status goes into **Need Updates**. To edit the test case, click **Make Changes**. This action will revert the status of the test case back to draft, allowing the testers to make the necessary changes. Repeat the [submission process](#) to have the test cases reviewed again.



- If the reviewer approves the test case, the status of the test case changes to **Ready**.

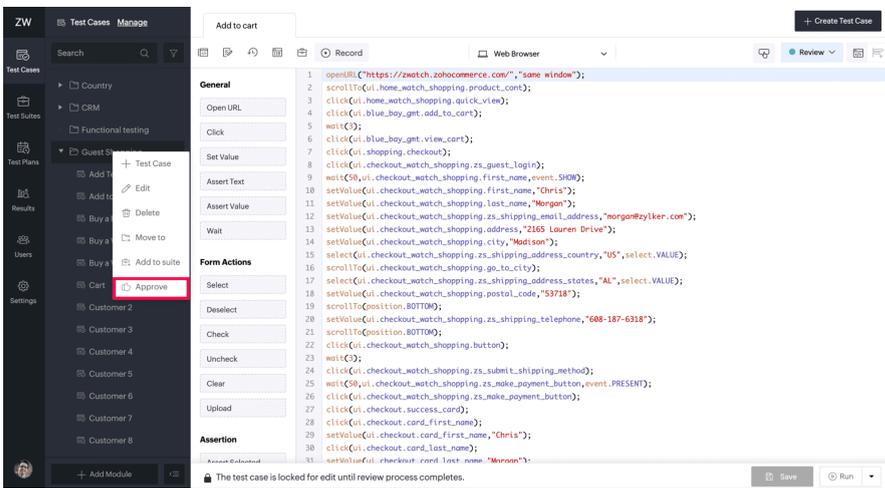


Note: The requester who submitted the test case for approval will be notified through email along with comments once the reviewer rejects or approves the test cases.

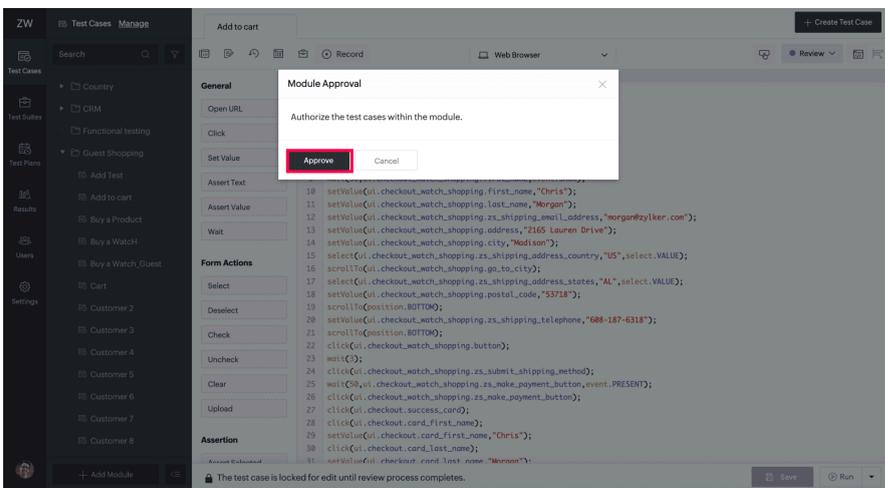
4.2.2. Approve test cases in modules

On the other hand, reviewers can approve all the test cases sent for review at a time.

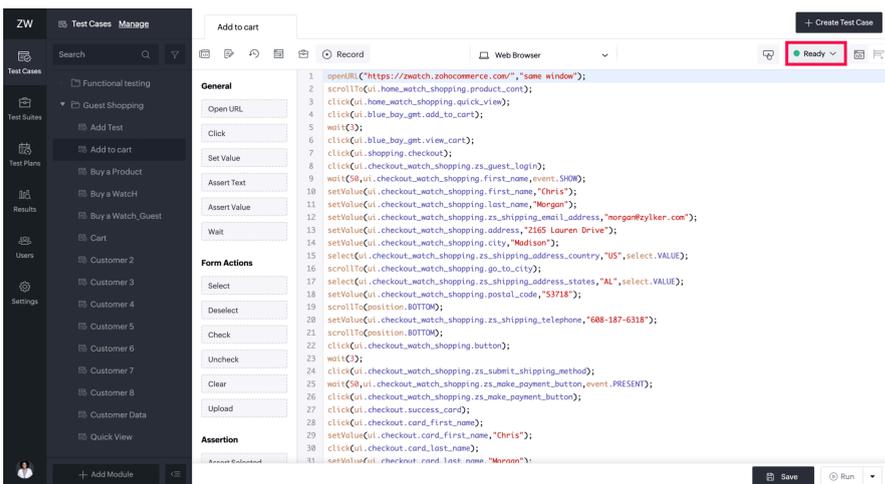
1. Right-click on the module with the test cases that need to be approved.
2. Click **Approve** to start the review process.



3. Click on **Approve** to bulk approve the test cases. The requester who submitted the module for approval will be notified through email.



Once the module is approved, the status of all the test cases in that module changes to **Ready**.



Note: If a reviewer wants to reject any test cases within the module, they must navigate to each test case individually and reject it. [Learn more](#)

5. Points to remember

- Changes made to the same test case are saved as [versions](#) within the editor page.
- Only approved versions of test cases are used in the test plan. If any of the test cases belonging to a test plan are edited, it'll be back to the *Draft* status, but this won't impact its execution. To use the edited versions of those test cases, they should be marked *Ready* (approved).

For example, a test case named "Buy a Product" has an approved version (version 1.7) which was getting executed in a test plan named "All Cases". Later, the test case was edited several times, which made its status back to *Draft*. In that case, the last approved version of the test case will be considered for the test plan until the latest version (version 3.2) attains the status *Ready*.

- If the approval process is disabled, the test cases will not undergo a review. Instead, users can mark them *Ready* as needed for inclusion in test plans.
- Test cases cannot be rejected in bulk. If any of the test cases needs changes, the reviewer must use the individual approval flow. [Learn more](#)

6. Related Links

- [Test Cases](#)
- [Test Suites](#)
- [Test Plans](#)
- [Results](#)