

Administration



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Overview

Test Case Designer provides an administration area where administrators can manage your organization's Test Case Designer instance and user permissions.



Looking for information on how to setup the Xray Test Case Designer? Check [this section](#).

To enable Xray Test Case Designer, you will need to make sure that Jira is at 8.22.x version or higher.

Access and Navigation



Administrator Profile

The initial assignment for at least one administrator is handled by our team. Please reach out to [the Xray Support team](#) for more details.

1

Once you are provisioned with the Admin role, you will be able to navigate to the portal using the *Organization Settings* option (Figure 1 - 1) in the Test Case Designer home screen, under your account name dropdown (Figure 1 - 2).

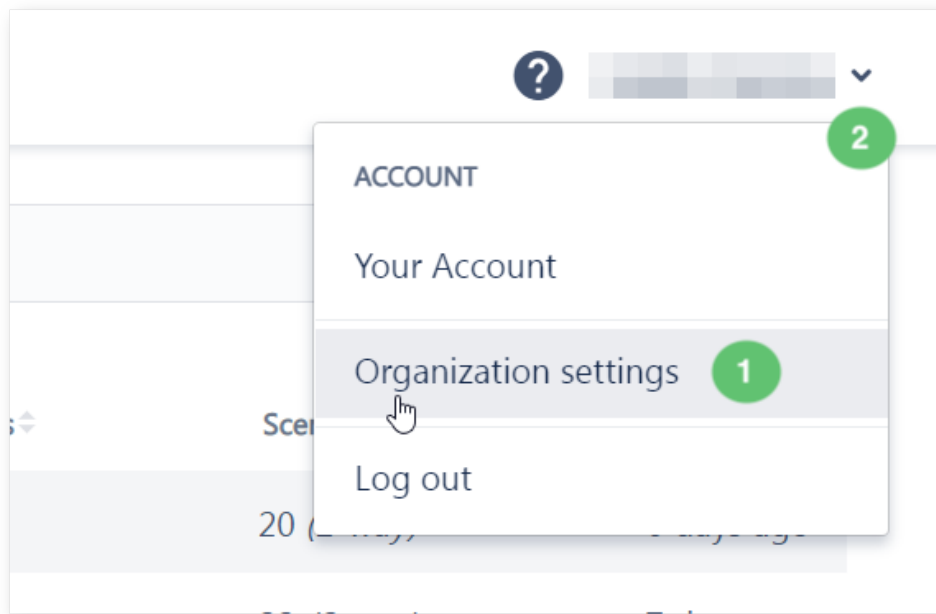


Figure 1 - Access

2

You will land on the Administration screen (Figure 2).

Name	Email	Edit Permissions	Models	Computations	Exports	Created At	Last Lo
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 18:40	12/13/2022 @ 18
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 12:17	Ne
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/12/2022 @ 12
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/13/2022 @ 12
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/08/22 @ 15:10	12/08/2022 @ 15
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/07/22 @ 06:14	12/07/2022 @ 06
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	2	4	0	12/05/22 @ 06:14	12/06/2022 @ 05
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/02/22 @ 08:43	12/14/2022 @ 06
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	5	5	0	12/02/22 @ 07:07	12/02/2022 @ 10
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	6	42	3	12/01/22 @ 06:40	12/22/2022 @ 04
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/01/22 @ 06:39	Ne
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	5	0	12/01/22 @ 05:58	12/09/2022 @ 04

Figure 2 - Administration

Here, you can see the following elements:

- The *Users* dropdown, which contains two options (Figure 2 - 2):
 - User Management* showcases the activity statistics both at the instance and at the individual levels.

- *Invite User* allows you to manually add users to your organization without requiring them to sign up. The *Invite User* button (Figure 2 - 5) also accomplishes this.
- *Customize* (Figure 2 - 3) includes the *Export Fields* feature which allows you to determine the fields and formats of the export options.
- *Organization Settings* (Figure 2 - 1) details displays the license information, where you can edit the approved domains, user authentication settings, and the metrics of users by period (like new users in the last 24 hours, disable users, total users, and others).
- The User management (Figure 2) table reflects the names and the emails associated with the organization, dates of creation and last login, cumulative usage metrics, and the allowed actions:
 - Enable/disable a user.
 - Make/remove organization admin.

i You can navigate back to the main working space by clicking the Xray Test Case Designer logo (Figure 2 - 6) or selecting the *Return to Xray Enterprise Designer* option from the account name dropdown.

The *Computations* column (Figure 2 - 7) stands for the number of *Scenario* clicks that resulted in the fresh generation, not the retrieval of cached ones.

Managing User Authentication Settings

From the *Organization Settings* screen (Figure 3 - 1), the *User Authentication Settings* screen (Figure 3) allows you to select and edit the authentication method (Figure 4 - 1), by clicking *User Authentication Settings* (Figure 3 - 2).

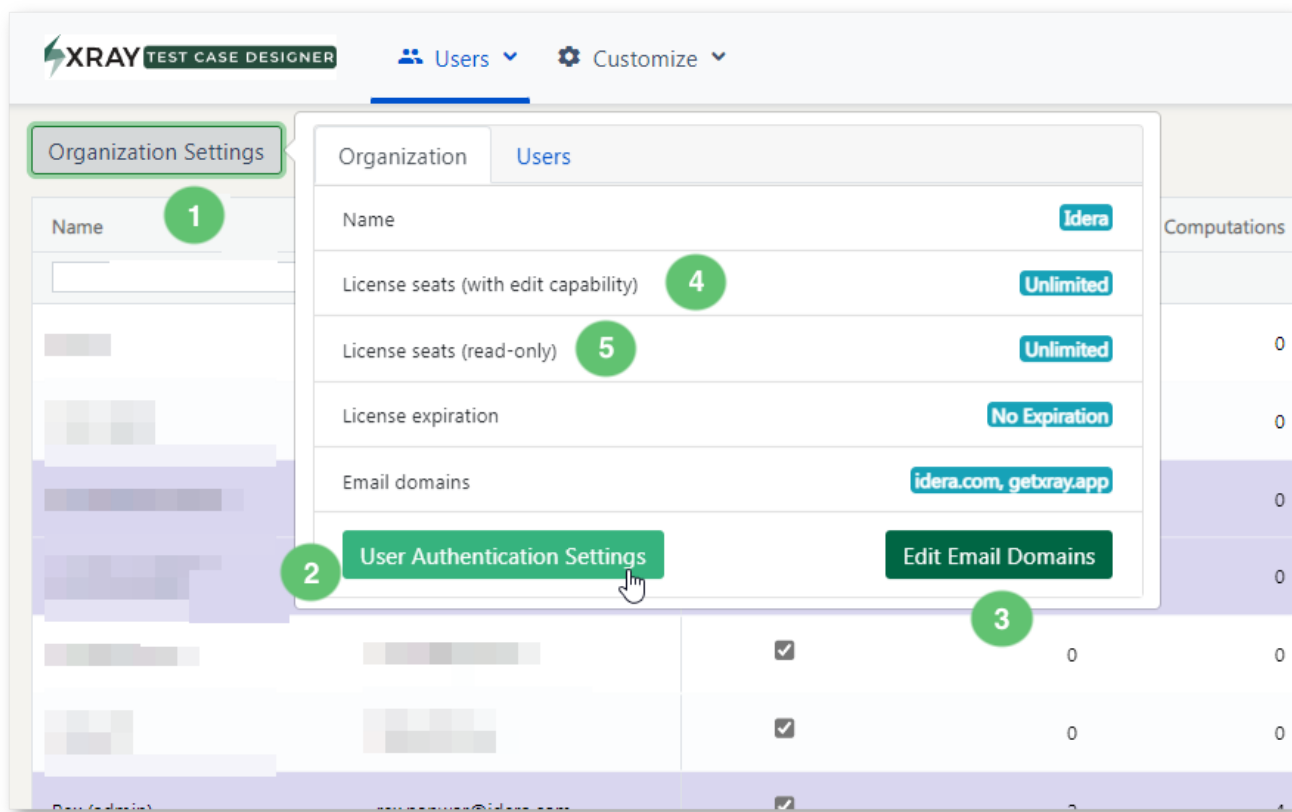


Figure 3 - Users

Once you're finished editing the authentication settings, click *Update Organization* (Figure 4 - 1).

Edit Authentication Settings

1

Authentication Type

Jira Server/DC OAuth 2.0

OAuth Server URL *

OAuth Client ID *

OAuth Client Secret *

7

5

Organization Specific OAuth Login URL (for Xray Configuration)

https://designer.getxray.app/oauth/

OAuth Callback URL

https://designer.getxray.app/oauth/callback

2

Update Organization

Figure 4 - Authentication

User Management

Setting Permission Levels

There are two permission levels:

- *Edit* (Figure 3 - 4).
- *Read-only* (Figure 3 - 5).

They have separate limits from the licensing standpoint, which can be seen in the Organization Settings screen (Figure 3).

The following rules apply when dealing with the seat limit:

- New self-registered users default to the *Edit* level if the seats are available and to *Read-only* otherwise.
- When a customer administrator tries to register an edit-level user while the number of edit-level seats for the organization has been exhausted, the red tooltip will display, and clicking *Register User* will require confirmation for *Read-only* switch.
- Blocked users do not count towards seat limits.

Within license limits, you can set the permission level per user at *Edit Permissions* or for the whole organization using this checkbox column (Figure 5 - 1).

- If the **checked** the user has *Edit* permission.
- If **unchecked** the user has *Read-only* permission.

(Checked = Edit seat/Unchecked = Read-only seat):

















Edit Permissions 1	Models	Computations	Exports	Created At ↓	Last Login	Actions
<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 18:40	12/13/2022 @ 18:40	 
<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 12:17	Never	 
<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/12/2022 @ 12:21	
<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/13/2022 @ 12:14	 2
<input checked="" type="checkbox"/>	0	0	0	12/08/22 @ 15:10	12/08/2022 @ 15:10	 3 
<input checked="" type="checkbox"/>	0	0	0	12/07/22 @ 06:14	12/07/2022 @ 06:14	 
<input checked="" type="checkbox"/>	2	4	0	12/05/22 @ 06:14	12/06/2022 @ 05:44	
<input checked="" type="checkbox"/>	0	0	0	12/02/22 @ 08:43	12/14/2022 @ 00:14	
<input checked="" type="checkbox"/>	5	5	0	12/02/22 @ 07:07	12/02/2022 @ 10:30	 
<input checked="" type="checkbox"/>	6	42	3	12/01/22 @ 06:40	12/22/2022 @ 04:38	
<input checked="" type="checkbox"/>	0	0	0	12/01/22 @ 06:39	Never	
<input checked="" type="checkbox"/>	0	5	0	12/01/22 @ 05:58	12/09/2022 @ 04:47	


Figure 5 - Permissions

Read-only Limitations

- The option to create a new model and export an existing one will be shown but disabled. Users will get a warning when trying to access them.
- [Parameters](#), [Rules](#), and [Scripts](#) will be available for review only and disabled for editing.
- Scenarios will be available for review for any pre-calculated strength but disabled for generating a new set.
- Commenting options (notes) will be available and fully functional.
- Sharing options will be disabled. From the perspective of inviting a read-only user to the project, they cannot be promoted to edit at the project level.


Setting the Administrator Role

In the Actions column in the table, you can use the green icon (Figure 5 - 2) to designate someone else as the Admin (in which case they can perform all the actions at the Administration Panel) or revoke such privileges.

 This option is available **only for enabled and verified users**.

Disabling/Enabling Users

The read icon (Figure 5 - 3) is for disabling users – either for the reason of license seat limitations, for them leaving the company, or for any other reason. You can choose to enable those users later – they will keep all their assets intact.

 The disabled users will be highlighted in red, the Admins in purple, and the regular users will have a white background.

Managing Email Domains

You can edit the email domains associated with the access to your organization.

1

Click the *Edit Email Domains* button (Figure 6 - 3).

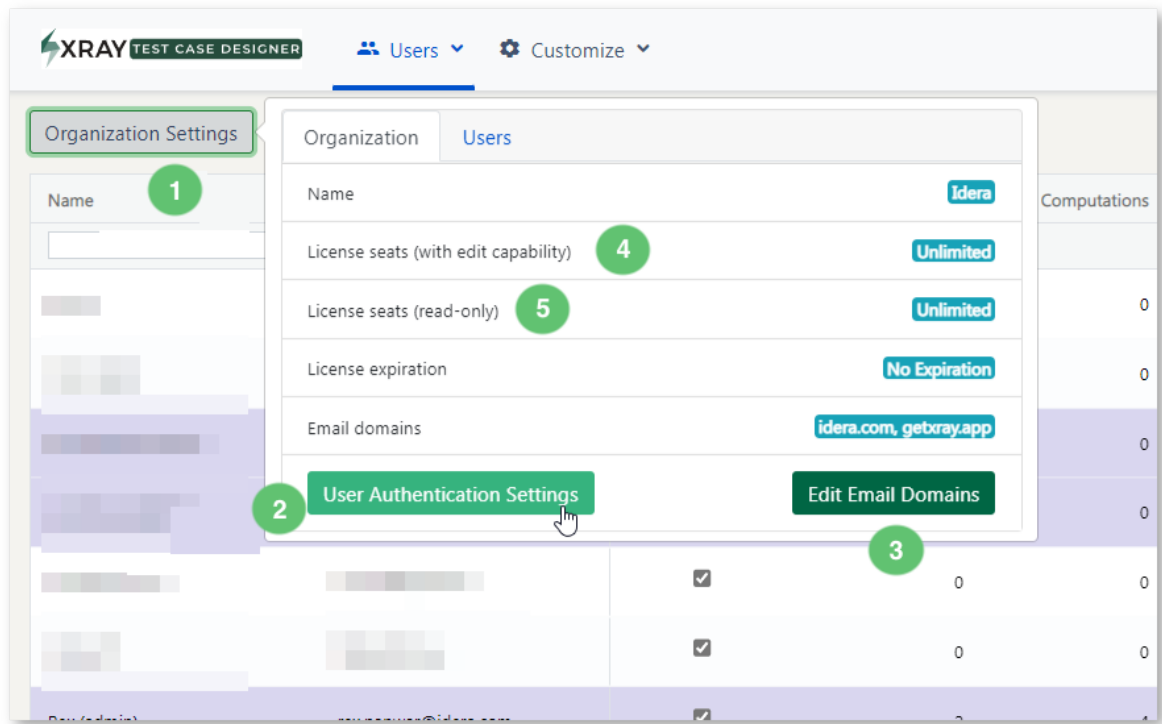


Figure 6 - Domains

2

A modal will open (Figure 7) for you to edit the domains (Figure 7 - 1).

Once you're finished, click the *Update Organization* button (Figure 7 - 2).

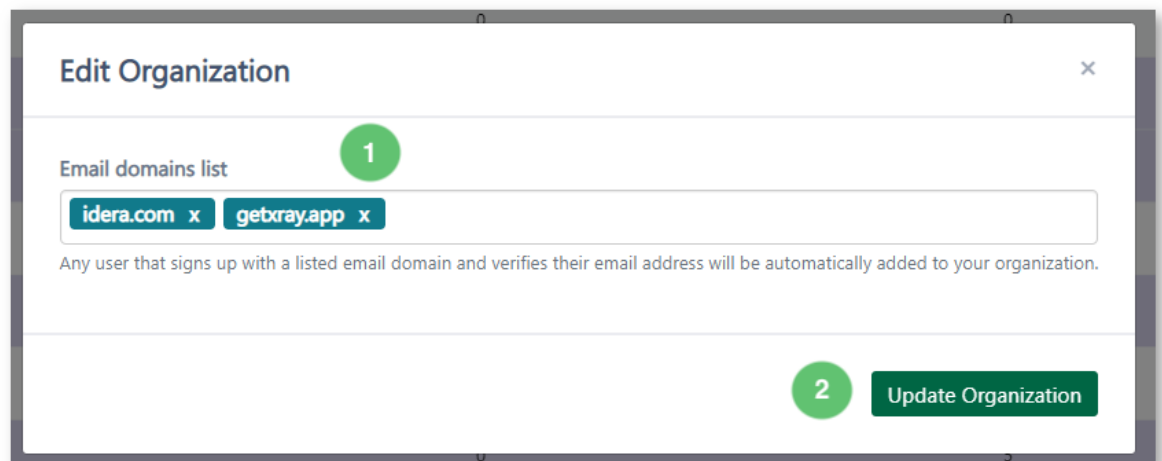


Figure 7 - Organization

Inviting a User



1

Click the *Invite User* button (Figure 8 - 5) to add a user. It will send a direct link to a single person with an email domain matching the list defined for your organization. The invitee will not need to follow the standard sign-up route; instead, they can use the link and the brief instructions in the email.

Name	Email	Edit Permissions	Models	Computations	Exports	Created At	Last Login
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 18:40	12/13/2022 @ 18:40
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 12:17	Ne
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/12/2022 @ 12:17
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/13/2022 @ 12:17
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/08/22 @ 15:10	12/08/2022 @ 15:10
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/07/22 @ 06:14	12/07/2022 @ 06:14
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	2	4	0	12/05/22 @ 06:14	12/06/2022 @ 05:10
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/02/22 @ 08:43	12/14/2022 @ 06:14
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	5	5	0	12/02/22 @ 07:07	12/02/2022 @ 10:22
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	6	42	3	12/01/22 @ 06:40	12/22/2022 @ 04:00
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	0	0	12/01/22 @ 06:39	Ne
[Redacted]	[Redacted]	<input checked="" type="checkbox"/>	0	5	0	12/01/22 @ 05:58	12/09/2022 @ 04:00

Figure 8 - User

2

A modal will open (Figure 9).

Fill in the user information (Figure 9 - 1; 2), and select the box to enable the Edit Permissions option (Figure 9 - 3).

Once you're finished, click the *Invite User* (Figure 9 - 4).

Invite User

×

1

Full Name

⋮

Email

Available license seats (with edit capability): Unlimited

2

☒ Edit Permissions

3

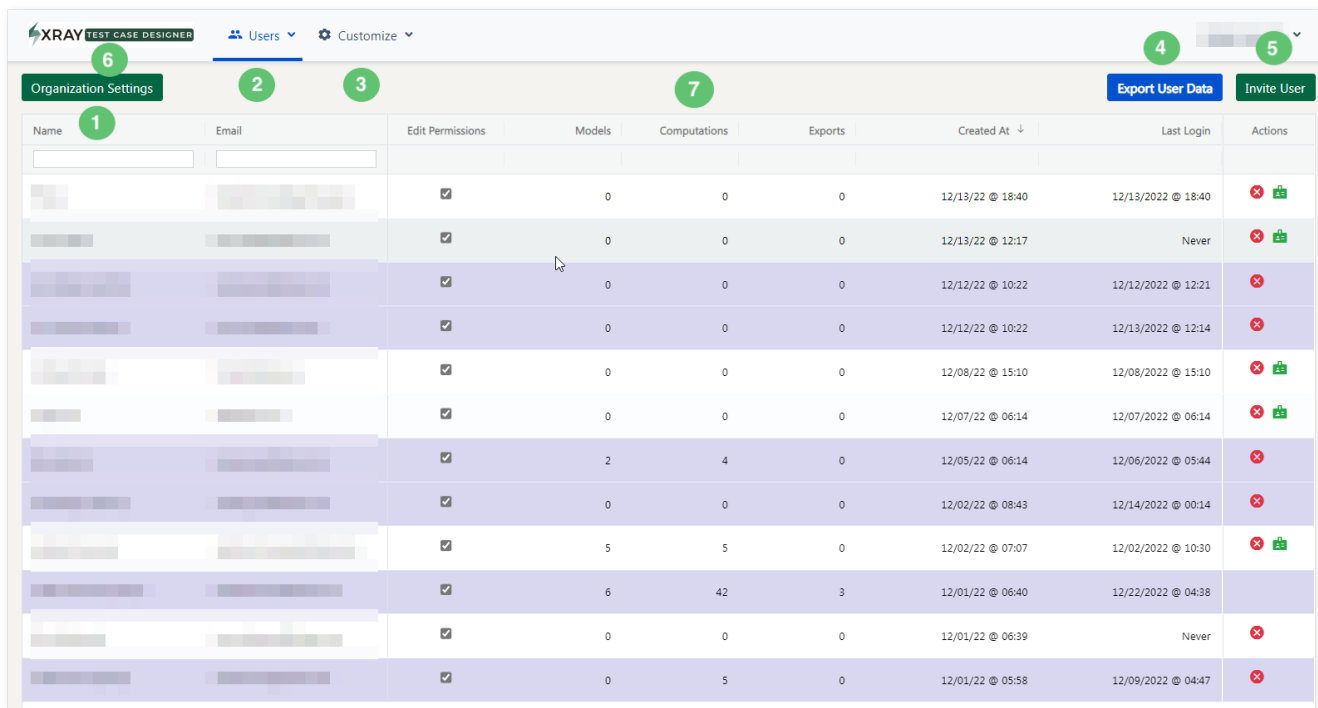
4

Invite User

Figure 9 - Information

Managing Export Configurations

You can access the export configuration screen by clicking the *Customize* button (Figure 10 - 3).



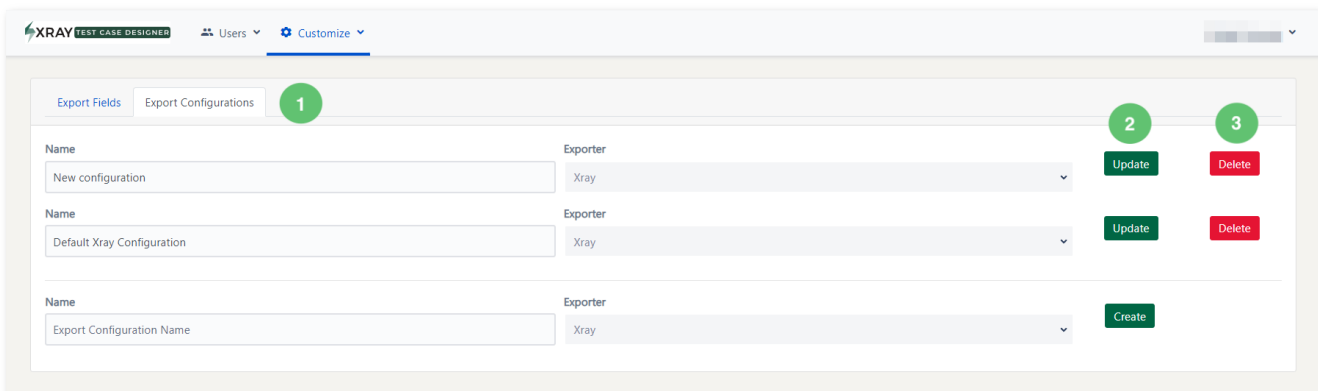
Name	Email	Edit Permissions	Models	Computations	Exports	Created At	Last Login	Actions
		<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 18:40	12/13/2022 @ 18:40	✖ ⚙
		<input checked="" type="checkbox"/>	0	0	0	12/13/22 @ 12:17	Never	✖ ⚙
		<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/12/2022 @ 12:21	✖
		<input checked="" type="checkbox"/>	0	0	0	12/12/22 @ 10:22	12/13/2022 @ 12:14	✖
		<input checked="" type="checkbox"/>	0	0	0	12/08/22 @ 15:10	12/08/2022 @ 15:10	✖ ⚙
		<input checked="" type="checkbox"/>	0	0	0	12/07/22 @ 06:14	12/07/2022 @ 06:14	✖ ⚙
		<input checked="" type="checkbox"/>	2	4	0	12/05/22 @ 06:14	12/06/2022 @ 05:44	✖
		<input checked="" type="checkbox"/>	0	0	0	12/02/22 @ 08:43	12/14/2022 @ 00:14	✖
		<input checked="" type="checkbox"/>	5	5	0	12/02/22 @ 07:07	12/02/2022 @ 10:30	✖ ⚙
		<input checked="" type="checkbox"/>	6	42	3	12/01/22 @ 06:40	12/22/2022 @ 04:38	
		<input checked="" type="checkbox"/>	0	0	0	12/01/22 @ 06:39	Never	✖
		<input checked="" type="checkbox"/>	0	5	0	12/01/22 @ 05:58	12/09/2022 @ 04:47	✖

Figure 10 - Customize

This screen (Figure 11) provides two main options/tabs:

Export Configurations

Here (Figure 11 - 1) you can manage the export configurations.



Export Fields

Export Configurations

1

Name

New configuration

Exporter

Xray

Update

Delete

Name

Default Xray Configuration

Exporter

Xray

Update

Delete

Name

Export Configuration Name

Exporter

Xray

Create

Figure 11 - Configuration

At this step, you just need to decide on the configuration name. You can update the default options to match your needs, but we generally recommend keeping them for reference purposes. You can have multiple configurations for the same target export if, e.g., teams have diverse options for relevant metadata columns.

Once you're done, click *Update* (Figure 11 - 2) to make the changes effective. You can also click *Delete* to remove the respective configuration (Figure 11 - 3).

Export Fields

Here (Figure 12) you can manage the field configurations, their format, and potential values.

Export Fields | Export Configurations

Edit Export Fields for: Default Xray Configuration | Script Type: Both

Order	Mandatory	Name	Field Type	Comma Delimited Values	Actions
1	<input type="checkbox"/>	Test ID Alternate Name		Populated Automatically	
2	<input checked="" type="checkbox"/>	Test Name Alternate Name Naming Convention		Test Name {scenario_name}_{#}	
3	<input type="checkbox"/>	Gherkin Alternate Name		Populated Automatically	
4	<input type="checkbox"/>	Description Alternate Name		Populated Automatically	

Add a New Export Field

Order	Mandatory	Name	Field Type	Comma Delimited Values	Actions
5	<input type="checkbox"/>		Text		Add

Update

Figure 12 - Fields

Edit Export Fields for (Figure 12 - 2) selects the Export Configuration to manage the fields.

The *Script Type* dropdown (Figure 12 - 1) allows you to select whether this configuration can apply only to Manual scripts, only to Automate, or to both.

Each field can be made mandatory or optional using the second column with the checkboxes (this will not affect the export of fields populated automatically). Finally, you can reorder fields using the indices in the first column (Figure 12 - 2).

There are three field types available (Figure 12 - 5):

- *Populated automatically* – depending on your scripting in Test Case Designer (Manual or Automate), certain core elements like Step Description or Gherkin Scenario Steps will be pulled from the source and will not be editable in the export dialog itself.
 - *Alternate Name* allows changing the displayed column name after export, which can make the mapping setup for Test management tools easier.
 - *Naming Convention* and *Example* for the Test Name can provide the template tooltip for syntax rules.
- *Text* – a fairly standard string field that can be left blank or specified with the default value.
- *Dropdown* – can handle the single selection with the options separated by commas (you can refer to the tooltips in the 4th column header for syntax guidance).

Once you're finished editing a field, click *Update* to make the changes effective (Figure 12 - 3).

You can add a new export field by clicking *Add* (Figure 12 - 4).

Xray API Sync

The API Synchronization process between TCD and Xray leverages the same configurations as the manual Xray export. However, there is 1 difference - in order to use a Jira custom field in your TCD Sync configuration, you have to reference it by ID (e.g. "customfield_10050"), not the UI label. You can find the custom field ID in Jira settings or by exporting an issue that has it to e.g. XML.

The field type doesn't have to match - a field can be free text in Jira, but you may want to set it to "Drop Down" in TCD for more control.

Lastly, [Jira REST APIs](#) have (at least) 3 types of handling for custom fields. Currently TCD Sync supports 2 ("no brackets", "square brackets"), but doesn't support the 3rd ("curly brackets"; except for Xray's Test Type). There is [an open suggestion](#) for that 3rd type in our backlog.

The workarounds are 1) manual export and mapping of the custom field columns; 2) API sync without that field, followed by the bulk Test issue update in Xray.

If you have questions or technical issues, please [contact the Support team via the Customer Portal \(Jira service management\)](#) or [send us a message using the in-app chat](#).