

# Quick Setup

After installing Xray, there are basically a few steps you need to make at the project level.

- [Configure Xray Issue Types in your project](#)
  - [Company-Managed Project](#) (old Classic Project)
  - [Team-Managed Project](#) (old Next-Gen Project)
- [Configure Requirements and Defects](#)

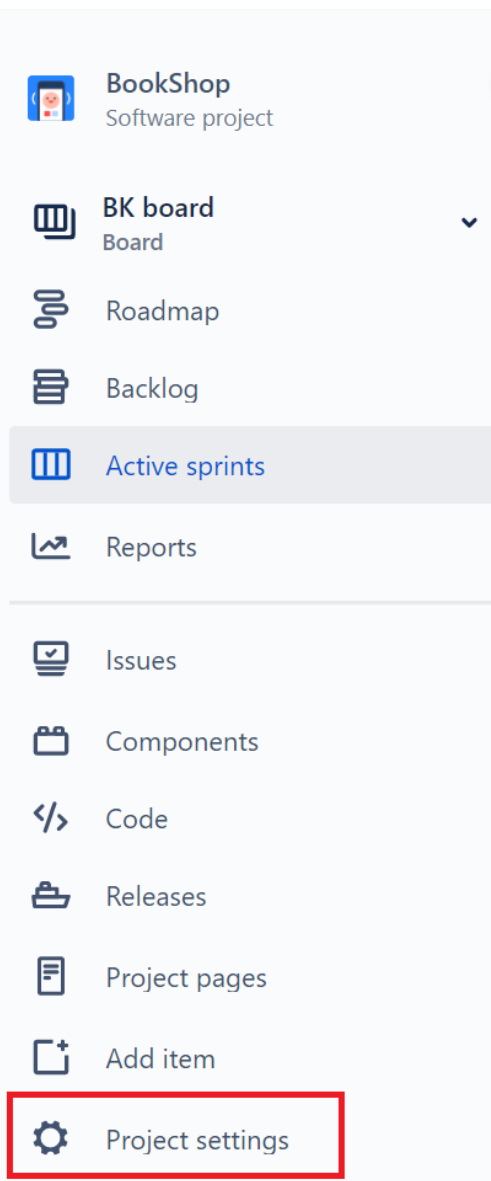


To enable Xray at the project level, the user needs to have "**Browse Projects**" permission enabled at the [Project Permission Scheme](#). If you do not have it, please ask help to your Jira Administrator before proceeding.

You can do it for a brand-new project or for an existing one.

If you're not sure where to start, you can create a [Demonstration Project](#) with sample data to explore.

These operations can all be done from within **Xray Settings** available at the project settings page.





## BookShop

Software project



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You're in a company-managed project

[Learn more](#)

## Configure Xray Issue Types in your project

In order to configure Xray issue types with a project, you must know if you are in a **team-managed** project or in a **company-managed** project. The configuration steps for Xray issue types will be different for each kind of project.

- [Company-Managed Project \(old Classic Project\)](#)
- [Team-Managed Project \(old Next-Gen Project\)](#)

### Company-Managed Project (old Classic Project)

Tests, along with other entities, are abstracted as Jira Issue Types. Thus, you need to add them to the Issue Type Scheme used by your project.

This can be done automatically by clicking the **Add Xray Issue Types** available in the **Summary** section within the project settings:

Xray Settings

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Defect Mapping

Test Types

Test Environments

Document Generator

Test Step Fields

Test Run Custom Fields

Default Column Layouts

Re-Indexing

Summary

This page contains a brief summary of the Xray configurations for this project.

Issue Types

1

Xray Issue Types in Project

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There are 0 Xray issue types configured for this project. In order to enable this project for testing with Xray, you need to configure the Xray issue types. You can do it automatically by pressing "Add Xray Issue Types" or manually by going into the issue type scheme for this project and adding the Xray issue types there.

Add Xray Issue Types

Configure the Issue Type Scheme manually

Name	Description	Present in Project
Test	This is the Xray Test Issue Type	
Precondition	This is the Xray Pre-Condition Issue Type	
Test Set	This is the Xray Test Set Issue Type	
Test Plan	This is the Xray Test Plan Issue Type	
Test Execution	This is the Xray Test Execution Issue Type	
Sub Test Execution	This is the Xray Sub Test Execution Issue Type	

Or manually either within the Jira administration or clicking **Configure the issue Type Scheme manually** available in the **Summary** section within the project settings:

## Xray Settings

### Summary

Miscellaneous

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## Summary













This page contains a brief summary of the Xray configurations for this project.

### Issue Types

**Xray Issue Types in Project**

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[Add Xray Issue Types](#) [Configure the Issue Type Scheme manually](#)

Name	Description	Present in Project
 Test	This is the Xray Test Issue Type	
 Precondition	This is the Xray Pre-Condition Issue Type	
 Test Set	This is the Xray Test Set Issue Type	
 Test Plan	This is the Xray Test Plan Issue Type	
 Test Execution	This is the Xray Test Execution Issue Type	
 Sub Test Execution	This is the Xray Sub Test Execution Issue Type	

1. Edit the Issue Type Scheme (be aware of the projects using it):





















Projects / BookShop / Project settings

## Issue types

### BK: Scrum Issue Type Scheme

Keep track of different types of issues, such as bugs or tasks. Each issue type can be configured differently.

The issue type scheme defines which issue types apply to this project. To change the issue types used, you can select a different issue type scheme. [Use a different scheme](#)

Issue Type	Description	Workflow	Field configuration	Screen
 Story	A user story. Created by Jira Software - do not edit or delete.	 Software Simplified Workflow for Project BK	 Default Field Configuration	 BK: Scrum Default Screen Scheme
 Bug	A problem which impairs or prevents the functions of the product.	 Software Simplified Workflow for Project BK	 Default Field Configuration	 BK: Scrum Bug Screen Scheme
 Epic	A big user story that needs to be broken down. Created by Jira Software - do not edit or delete.	 Software Simplified Workflow for Project BK	 Default Field Configuration	 BK: Scrum Default Screen Scheme
 Task	A task that needs to be done.	 Software Simplified Workflow for Project BK	 Default Field Configuration	 BK: Scrum Default Screen Scheme
 Sub-task	The sub-task of the issue	 Software Simplified Workflow for Project BK	 Default Field Configuration	 BK: Scrum Default Screen Scheme

2. Add Test, Precondition, Test Set, Test Execution, Sub-Test Execution issue types by dragging them from the **Available Issue Types** column on the right side to the **Issue Types for Current Scheme** on the left side. Click Save.

## Issues

Search Jira admin

### Modify Issue Type Scheme — BK: Scrum Issue Type Scheme

SHARED BY 1 PROJECT

+ Add issue type

Scheme Name

BK: Scrum Issue Type Scheme

Description

Default Issue Type

Story

Change the order of the options by **dragging and dropping** the option into the desired order. Similarly, **drag and drop** the option from one list to the other to add or remove them.

#### Issue Types for Current Scheme

Remove all



Task



Sub-task (sub-task)



Story



Bug



Epic

#### Available Issue Types

Add all



Sub Test Execution (sub-task)



Precondition



Test



Test Set



Test Plan



Test Execution

Save

Reset

Cancel

#### Issue Types for Current Scheme

Remove all



Task



Sub-task (sub-task)



Story



Bug



Epic



Test



Precondition



Test Set



Test Execution



Sub Test Execution (sub-task)



Test Plan

Save

Reset

Cancel



## Info

When a company-managed project is configured, the **Testing Board** may not be visible right away:



**BookShop**  
Software project



**BK board**  
Board



Roadmap



Backlog



Active sprints



Reports



Issues



Components



Code



Releases



Project pages



Testing Board



Add item



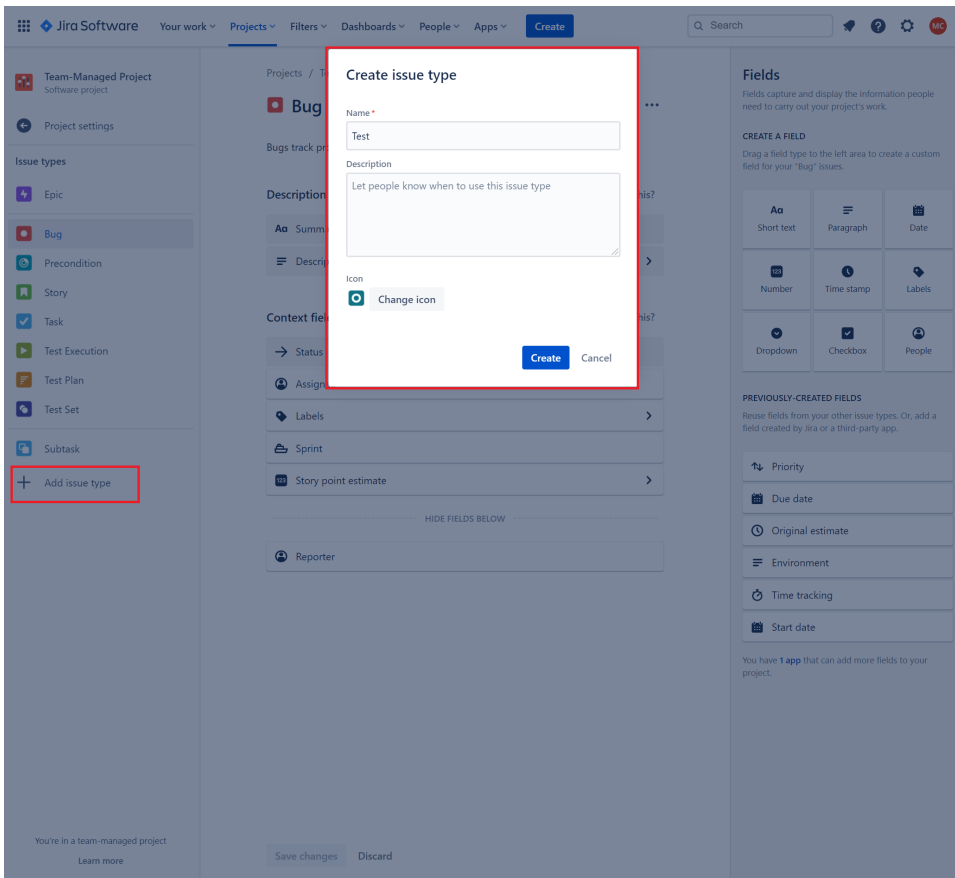
Project settings

If this is the case, after configuring it, simply access a page containing Xray information, such as an Xray issue of the given project or Xray Settings of that same project and then refresh the page.

## Team-Managed Project (old Next-Gen Project)

Within team-managed projects, you first need to create the necessary issue types manually.

1. In the team-managed project settings, navigate to **Issue Types** and press **Add Issue Type**. Specify a name, description and icon for the new issue type. For simplicity, you can choose the same issue type names as the default global Xray issue types. Repeat these steps for all other necessary Xray entities such as: **Test**, **Precondition**, **Test Set**, **Test Plan** and **Test Execution**. E.g. Creating the Test issue type:



2. You can download the icons for the Xray issue types below:





3. Map Issue Types to Xray entities: The next step is to map the issue types created in the first step with Xray entities. You can do that by accessing the Xray "**Issue Types Mapping**" settings page and selecting the corresponding issue types:

The screenshot shows the Jira Software interface for a Team-Managed Project. The left sidebar contains navigation links for 'Team-Managed Project', 'Project settings', 'Apps', 'App fields', 'Xray Settings', 'Project automation', and 'Slack integration'. The main content area is titled 'Xray Settings' and includes a sub-section 'Issue Types Mapping'. A warning message states: 'Manual configuration required. In order to configure Xray issue types for this team-managed project, you first need to create the issue types manually on the project configuration. After the creation of the issue types for the Xray entities you need, you must associated them below.' The settings are organized into sections: 'Test', 'Precondition', 'Test Set', 'Test Plan', and 'Test Execution', each with a dropdown menu to select an issue type. A 'Save' button is at the bottom.







#### Learn more

Refer to the specific [Project Settings](#) page or take a look at the extensive [Global Settings](#) if you want to fine-tune Xray or adapt it to your specific needs.