Quick Setup

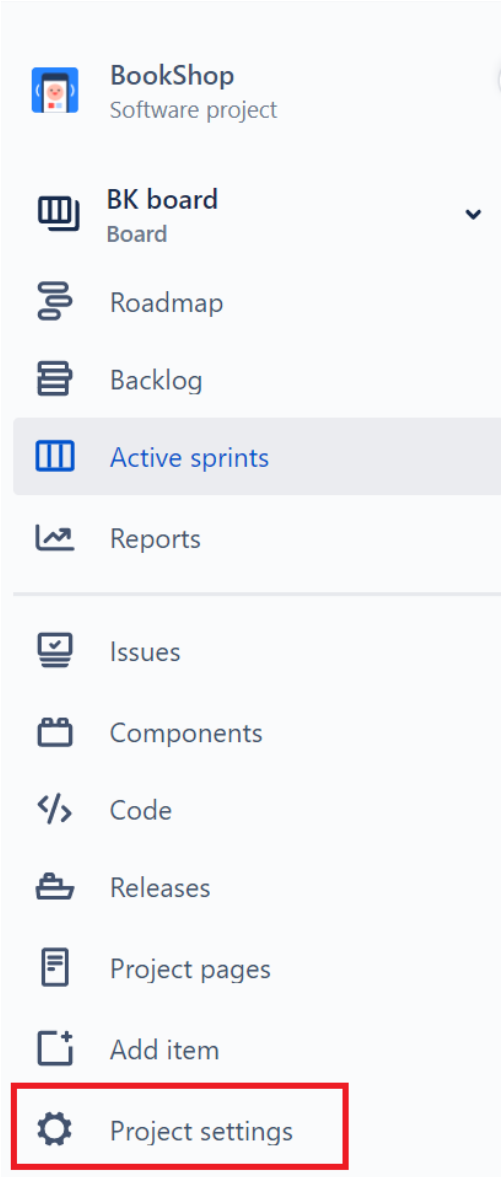
After installing Xray, there are basically a few steps you need to make at the project level.

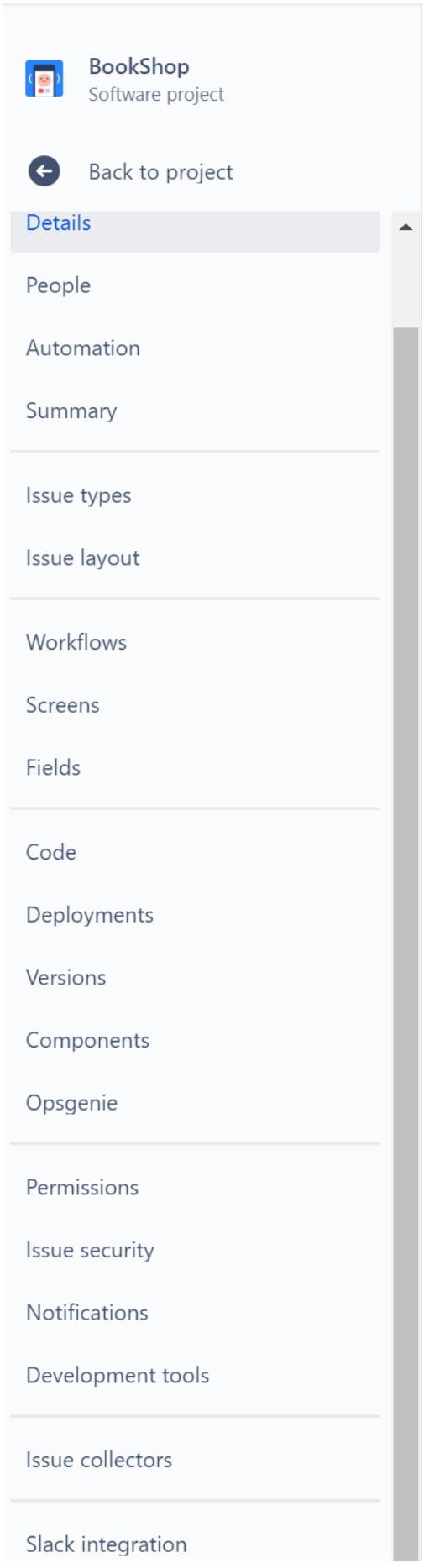
- Configure Xray Issue Types in your project
  - Company-Managed Project (old Classic Project)
  - Team-Managed Project (old Next-Gen Project)
- Configure Requirements and Defects

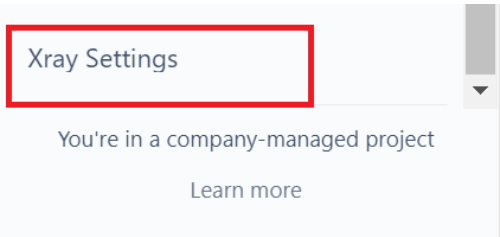
To enable Xray at the project level, the user needs to have "**Browse Projects"** permission enabled at the Project Permission Scheme. If you do not have it, please ask help to your Jira Administrator before proceeding.

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

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


BookShop
Software project
BK board
Board
Roadmap
Backlog
Active sprints
Reports
Issues
Components
Code
Releases
Project pages
Add item
Project settings


BookShop
Software project
Back to project
Details
People
Automation
Summary
Issue types
Issue layout
Workflows
Screens
Fields
Code
Deployments
Versions
Components
Opsgenie
Permissions
Issue security
Notifications
Development tools
Issue collectors
Slack integration



Configure Xray Issue Types in your project

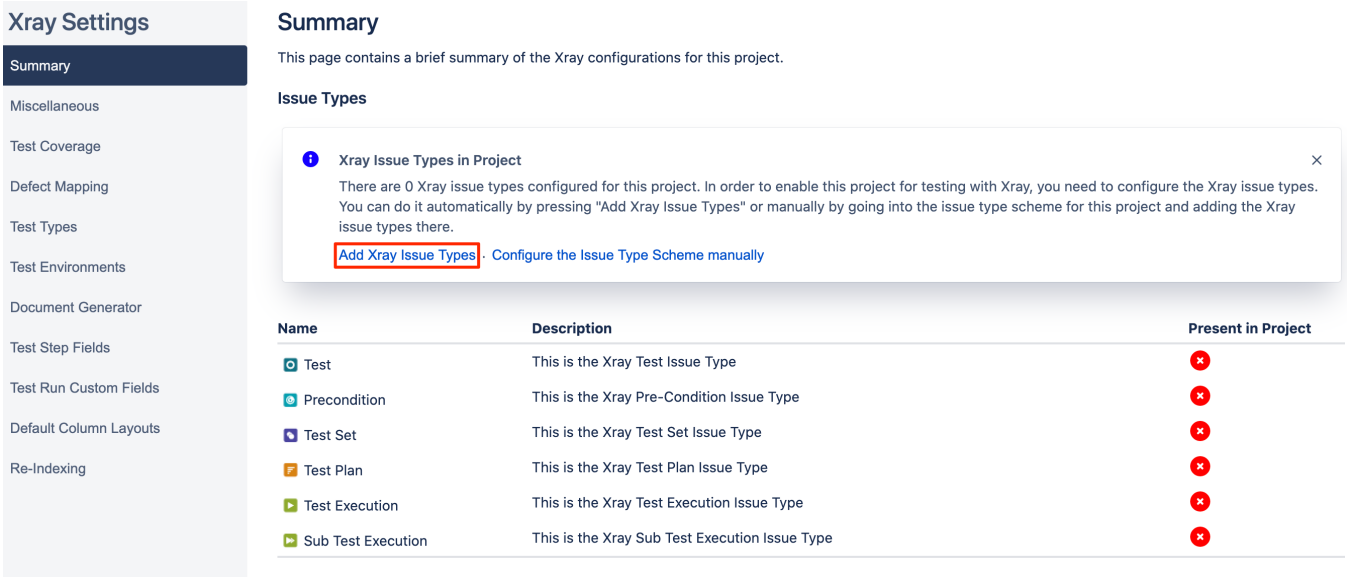
In order to configure Xray issue types with a project, you must know if you are in a **team-managed** project or in a **company-managed** project. The configuration steps for Xray issue types will be different for each kind of project.

- Company-Managed Project (old Classic Project)
- Team-Managed Project (old Next-Gen Project)

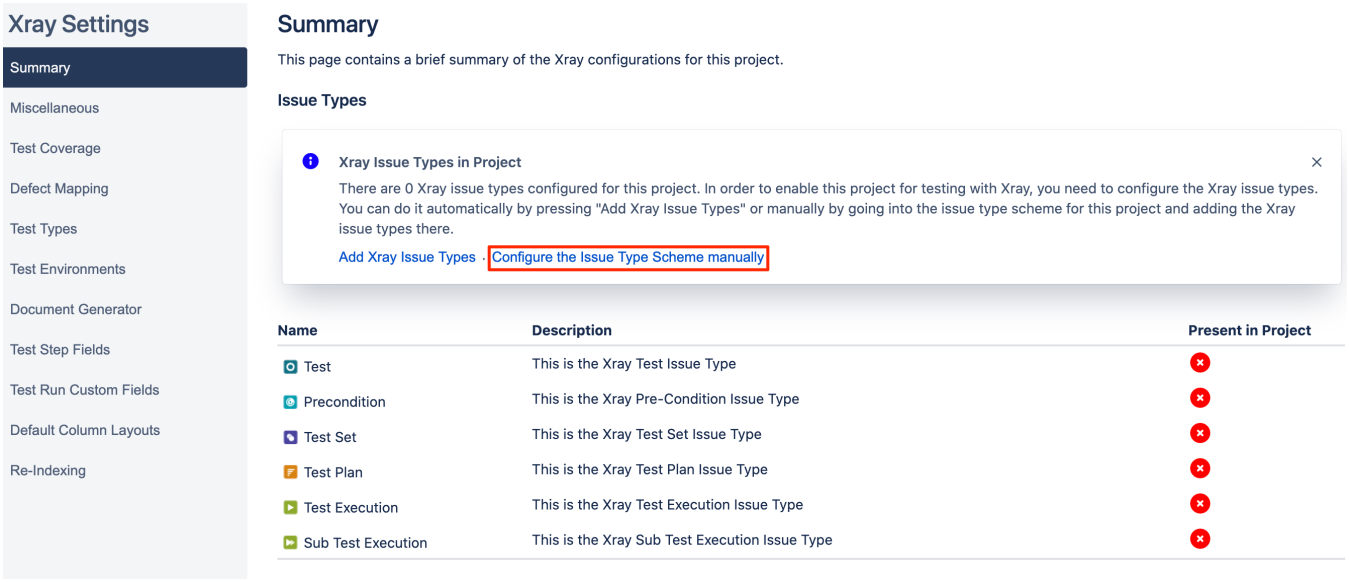
Company-Managed Project (old Classic Project)

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.

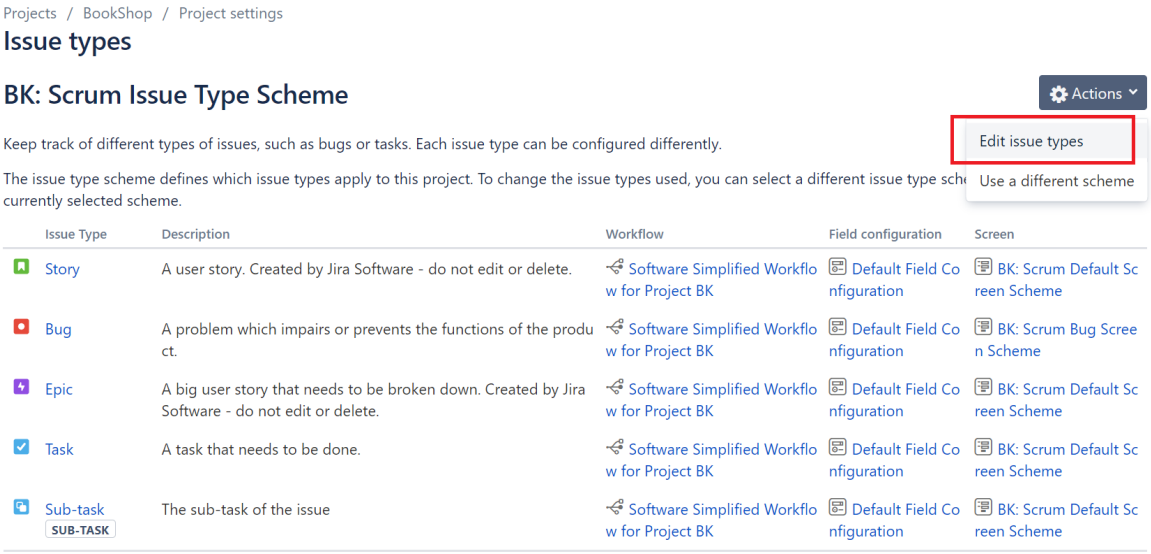
This can be done automatically by clicking the **Add Xray Issue Types** available in the **Summary** section within the project settings:



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



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



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

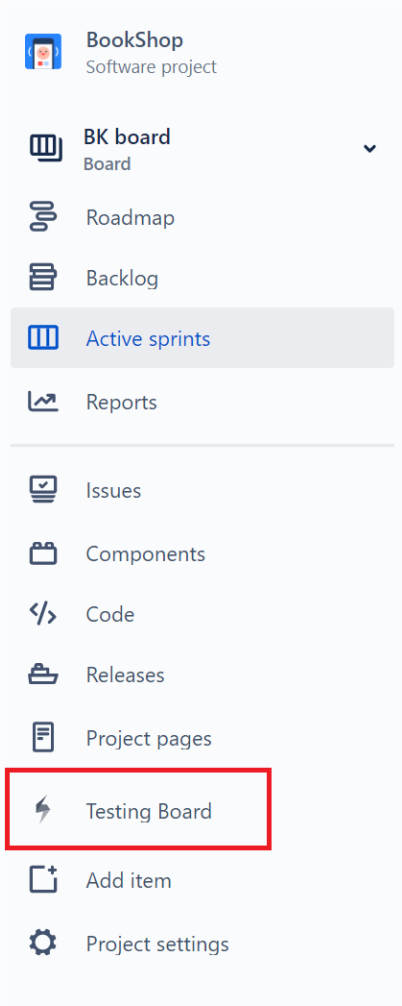
Remove all

- 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:

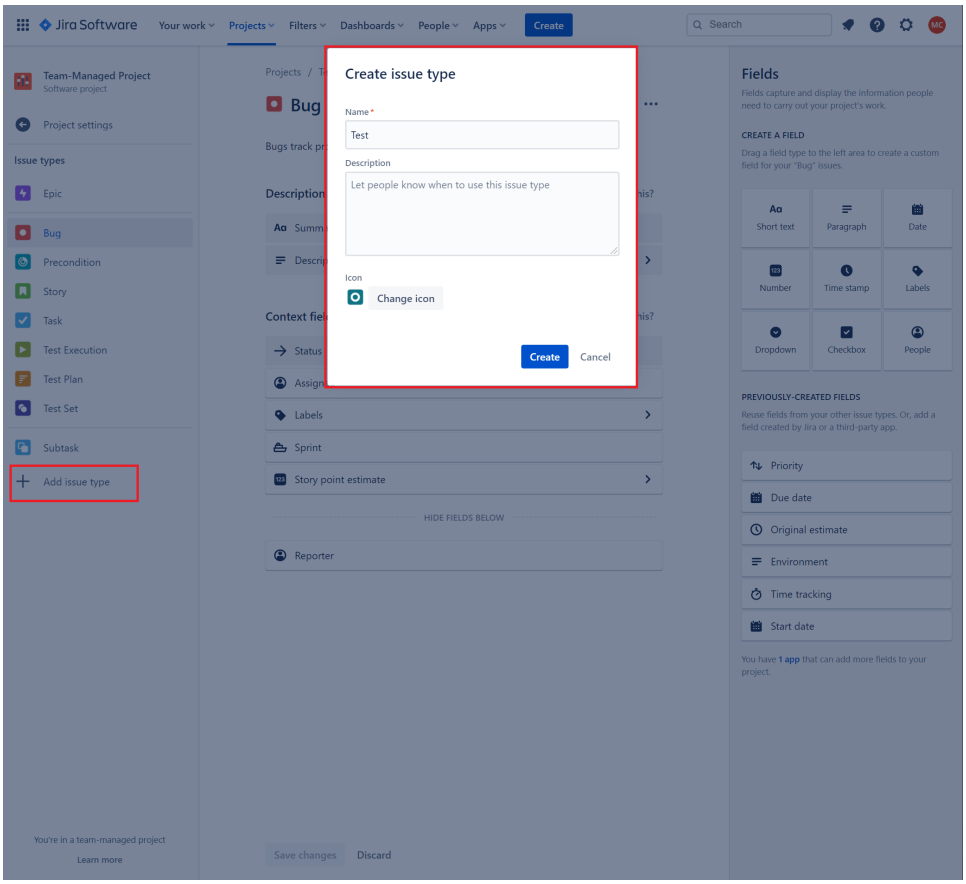


If this is the case, after configuring it, simply access a page containing Xray information, such as an Xray issue of the given project or Xray Settings of that same project and then refresh the page.

Team-Managed Project (old Next-Gen Project)

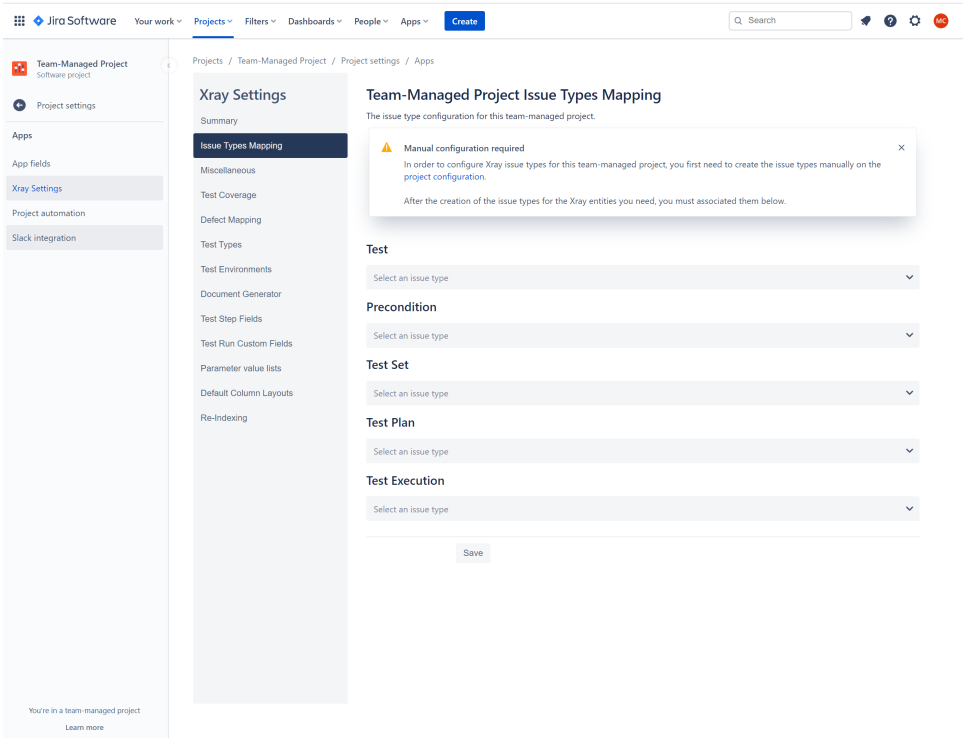
Within team-managed projects, you first need to create the necessary issue types manually.

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:

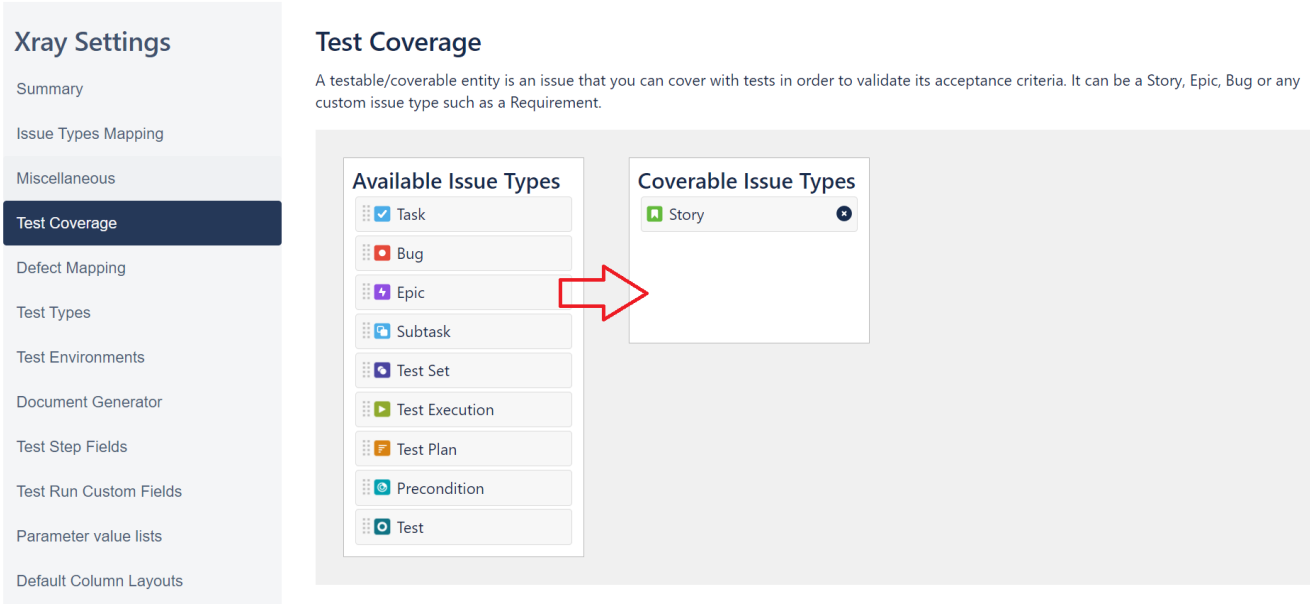
3. Map Issue Types to Xray entities: The next step is to map the issue types created in the first step with Xray entities. You can do that by accessing the Xray "**Issue Types Mapping**" settings page and selecting the corresponding issue types:



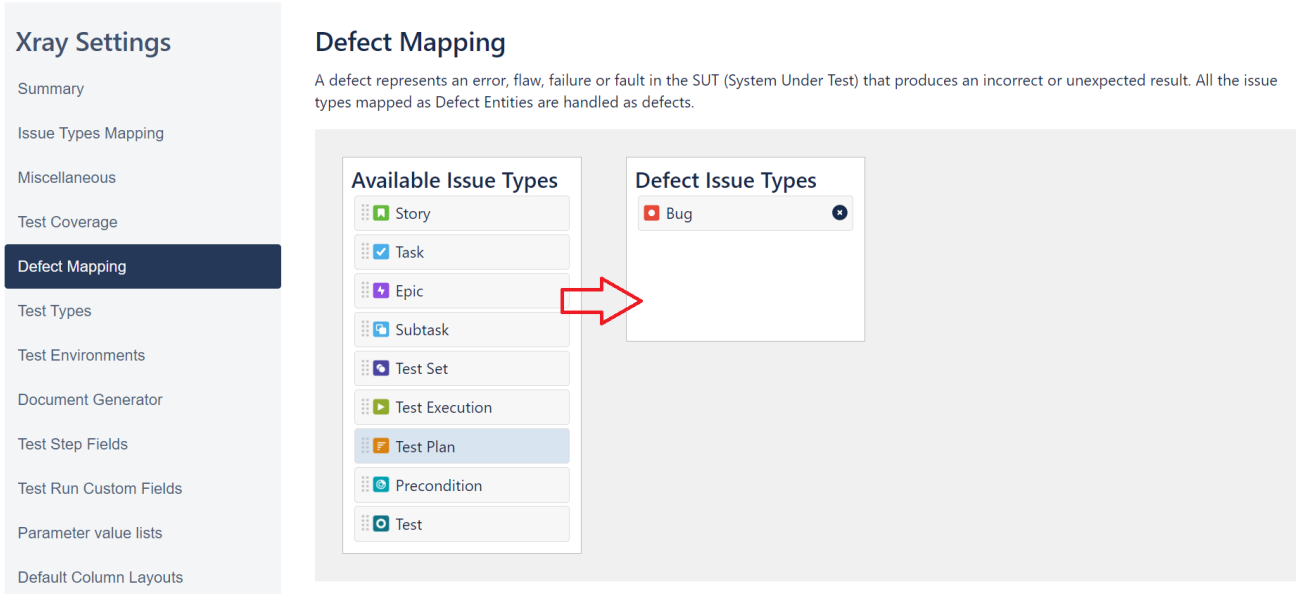
Now you should be able to start creating Xray entities within your **team-managed** project. These issue types will behave exactly like the global Xray issue types that are installed by Xray.

Configure Requirements and Defects

1. In the **Test Coverage** section, define the Covered Issue Types (i.e., the testable entities such as the typical requirements, user stories, epics). Drag the ones you want from the **Available Issue Types** column (e.g., Epic, Story) to the **Covered Issue Types** column. Click Save.



2. In the **Defect Mapping** section, define the Covered Issue Types (i.e., the testable entities). Drag the ones you want from the **Available Issue Types** column (e.g., Story, Epic) to the **Defect Issue Types**. Click Save.



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.