

# Quick Setup

After installing Xray, there are basically two steps you need to make or ensure before starting to use it.

- [Configure Requirements and Defects](#)
- [Enable Xray in your projects](#)
  - [Enable testing in existing projects](#)
  - [Create new projects from scratch with testing enabled](#)
- [Configure Test Case Designer](#)

## Configure Requirements and Defects

In Jira's administration, in the Add-ons tab, go to Issue Type Mapping and configure what issue types should be considered as "requirements" and "defects".

Manage Templates

Template Store

Permission Schemes

Manage File Servers

Post Function Authentication

License Management

Documentation

XRAY FOR JIRA

Global Preferences

Custom Field Preferences

**Issue Type Mapping**

Available Issue Types

- Requirement
- Bug
- Epic
- New Feature
- Task
- Improvement
- Story
- User Story
- Test
- Test Set

Requirement Issue Types

- New Feature
- Requirement
- SubRequirement
- Story
- Epic
- Task
- Sub-task

Defect Issue Types

- Bug



Xray Issue Types (Test, Test Plan, Test Set, Test Execution, Sub-Test Execution and Precondition) MUST NOT be mapped as Requirements nor Defects.



### Learn more

Refer to the specific [Issue Type Mapping](#) page or take a look at the extensive [Administration & Configuration](#) if you want to fine-tune Xray or adapt it to your specific needs.

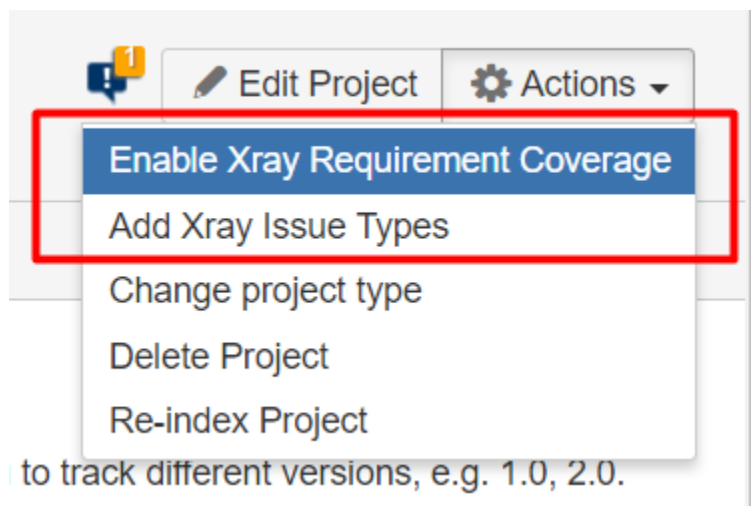
## Enable Xray in your projects

You can enable Xray for your existing projects or create a new project with both standard and Xray issue types.

### Enable testing in existing projects

For existing projects, in the project Administration page, go to Actions at the top right-hand side. You can either:

- a) set your project as a Requirements project by choosing "Enable Xray Requirement Coverage", so the requirements are covered by tests; or
- b) add Xray issue types (i.e., Test, Test Set, Test Execution, Test Plan) to the project.



**i Please note**

Since the Issue Type Scheme being used by your project may also be used by other projects, in order to add Xray's Issue Types from the project settings page you must belong to a group allowed to do so in Xray settings. The allowed groups to add Xray Issue Types can be defined in [this setting](#).

**i Learn more**

- [Configure Jira project to be used as Requirements project](#)
- [Configure Jira project to be used as Xray Test Project](#)
- [Configuring Xray with an Existing Project](#)


## Create new projects from scratch with testing enabled


If, instead, you want to [quickly create a new project](#) and use it to manage everything (e.g., requirements, defects, tests), go to the Jira Administration page for Projects. In the creation dialog, choose "Xray Test Project".


Create project

[View Marketplace Workflows](#)


SOFTWARE

**Scrum software development**  
Agile development with a board, sprints and stories. Connects with source and build tools.

**Kanban software development**  
Optimise development flow with a board. Connects with source and build tools.

**Basic software development**  
Track development tasks and bugs. Connects with source and build tools.

BUSINESS

**Xray Test Project**  
Create a JIRA project using the Xray default issue types and screen configuration.

Project management

[Import a project](#) | [Create with shared configuration](#)

Next

Cancel



#### Learn more

See [Creating a Test Project using an Xray Template](#).

## Configure Test Case Designer



Test Case Designer is a cloud powered feature and requires user to make an initial configuration to allow access.



To enable Xray Test Case designer you need to make sure that Jira is at in 8.22.x or higher.

1

Step 1 - Create a new Application Link

- Head to Jira Administration Applications Integrations Application Links

**Administration** Search Jira admin

**Applications** Projects Issues Manage apps User management Latest upgrade report System

Versions & licenses  
Plan your upgrade  
Application access

JIRA SOFTWARE  
Jira Software configuration

INTEGRATIONS  
**Application links**  
DVCS accounts  
Bamboo configuration  
FishEye  
Perforce

Application Navigator

### Application links

Application links let you integrate Jira with another Atlassian product or external application so they can [application links](#)

Application	Version
<b>Test Case Designer</b>	Generic .
<b>Xray Exploratory App</b>	Generic .

- Select "Create link";
- On the popup window select "External application" on the Application type and "Incoming" on the Direction options;

## Create link

Select the type of application you want to connect to.

### Application type\*

☐ Atlassian product

Link to Jira, Confluence, Bitbucket, Bamboo, Crowd, Fisheye and Crucible.

☒ External application

Link to an external application using OAuth 2.0.

### Direction\*

☒ Incoming

The application can access data from Jira.

☐ Outgoing

Jira can access data from the application.

**Continue**

Cancel

- Click "Continue";
- On the "Configure an incoming link" fill in:
  - **Name**, name for this application link;
  - **Redirect URL**, fill with this endpoint "<https://designer.getxray.app/oauth/callback>"
  - **Permission**, at least **Write** permissions.
- Click "Save"

- On the created Application link, select the action "View credentials" from the dropdown.

**Administration** Search Jira admin

**Applications** Projects Issues Manage apps User management Latest upgrade report System

Versions & licenses  
Plan your upgrade  
Application access

JIRA SOFTWARE  
Jira Software configuration

INTEGRATIONS  
**Application links**  
DVCS accounts  
Bamboo configuration  
FishEye  
Perforce  
Application Navigator

**Application links** Create link

Application links let you integrate Jira with another Atlassian product or external application so they can exchange information, resources, and functionalities. What exactly is exchanged will depend on the applications you link. [Learn more about application links](#)

Application	Version	Direction	Status	Actions
<b>Test Case Designer</b>	Generic Application	Incoming	NON-ATLASSIAN	
<b>Xray Exploratory App</b>	Generic Application	Incoming	NON-ATLASSIAN	

*Note: A red arrow points to the "View credentials" option in the dropdown menu for the "Xray Exploratory App".*

- On the credentials screen, copy the "Client ID" and "Client secret"

[Back to Application links](#)

## Credentials

To complete the configuration, copy these OAuth 2.0 credentials to the external application. You can always view them in the details of your application link.

Application

Test Case Designer

Application type

External application - incoming

Client ID

Copy

Client secret

Copy

- Send an email to [support@getxray.app](mailto:support@getxray.app) or create a support [ticket](#) with the title "New Enterprise Support users" with the following information:

- Client ID
- Client secret
- Your Jira Server URL

Our support team will then initialize your organization and share back your Xray Test Case Designer **custom URL**.

3

Step 3 - Configure the Xray Test Case Designer custom URL

- After receiving the Custom URL, from our support team, just head to Administration Manage Apps Xray Xray Enterprise

**Administration** Q Search Jira admin

Applications Projects Issues **Manage apps** User management Latest upgrade report System

ATLASSIAN MARKETPLACE  
JIRA WORKFLOW TOOLBOX  
ADVANCED ROADMAPS FOR JIRA  
Advanced Roadmaps permissions  
Advanced Roadmaps license details  
Hierarchy configuration  
Dependencies  
Advanced Roadmaps early access features

XRAY  
Miscellaneous  
Custom Fields  
**Xray Enterprise**  
Issue Type Mapping  
Requirement Coverage

### Xray Enterprise Settings

This page contains settings related with Xray Enterprise.

#### Xray Test Case Designer

Custom URL

Defines the Xray Test Case Designer URL, so users can access through the project menu. The Xray Test Case Designer menu option will only be displayed if an URL is provided and the project is an Xray project.

- Fill in the "Custom URL" field with the link provided.
- Click "Save"

You will now be able to see the new option on projects menu for Test Case Designer

- Summary
- Issues
- Reports
- Xray Reports
- Xray Test Case Designer**
- Xray Test Repository
- Xray Test Plan Board
- Automated Steps Library
- Add-ons

PROJECT SHORTCUTS

Add a link to useful information for your whole team to see.

+ Add link

