

Quick Guide for Admin

Before you start:

When setting up Xray, you may need the input from the testing/QA team about usage and preferences.

We recommend you discuss the following points before you begin to configure Xray:

- Which entities must be considered as requirements and defects?
- What is the correct project organization for my team? Should I have Tests & Requirements in the same project or in separate projects?

Check [QA Manager quick guide](#) to get more info on this.

1

Configure Requirements & Defects

First, you need to set which issue types are going to be considered requirements & defects.

1. In Jira's administration, in the Manage Apps tab, go to Issue Type Mapping and drag-and-drop the issue types that should be considered "requirements" and "defects."



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



Info

Requirements can be covered by Tests, and are the expected results for the system. They don't have to be requirements in a strict sense, but we use this term to simplify the explanation.

Examples: Requirement, Story, Epic, Feature, Improvement and others.

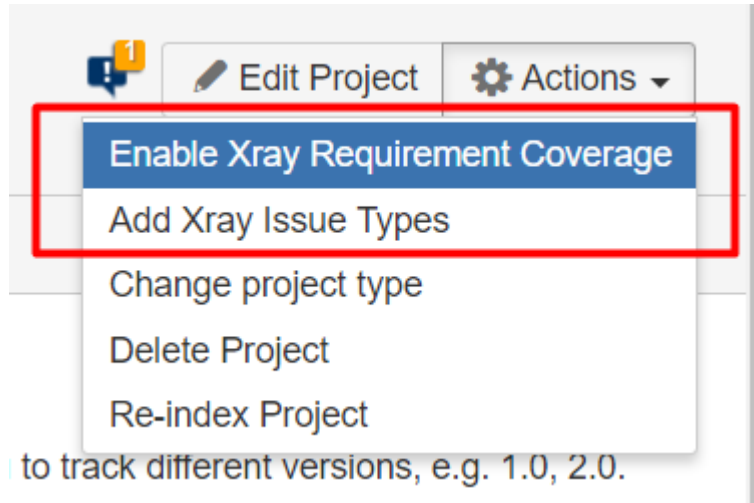
Defects are identified during Tests Executions, and represent a condition in the system that does not meet the requirement or end-user expectations. Example: Defect, Bug, Fault, and others.

2

Enable Requirement Coverage

If your existing project will have requirements that are going to be covered by tests, you need to enable requirement coverage, so specific information is shown for them and you can create tests for them.

1. Go to Project Administration > Actions and "Enable Xray Requirement Coverage"



3

Add Xray issue types to your schemes

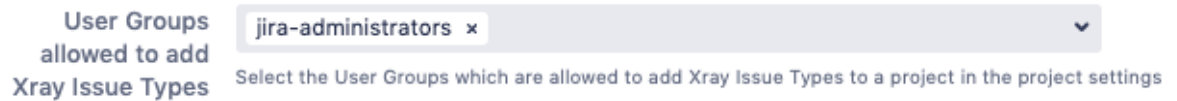


Info

You don't need to perform this step if you use the Xray Template to create a new project.

You may want to include Xray issue Types (such as Test, Test Plan, Test Set, Test execution) to your already created Issue Type Schemes & Issue Type Screen Schemes. This will enable you to use Xray in existing projects.

1. Check if the setting at **Jira Administration > Manage Apps > Miscellaneous > Users Groups allowed to add Xray Issue Types** contains a group in which your user is included, for example, the jira-administrators group.



2. At your project, go to the Project Administration > Actions and "Add Xray Issue Types".



⚙️ Actions ▾

Enable Xray Requirement Coverage

Import Automated Steps

Add Xray Issue Types



Your Issue Type Schemes & Issue Type Screen Schemes are going to be changed by this operation. Don't forget that the schemes may be shared with other projects.

4

Using Agile Boards? Track Coverage Status on your Agile boards

Your team might find it useful to see if the requirement is uncovered by a test, if the test has failed or passed directly on your agile board. For that, you need to add "Requirement Status" (custom field) to your agile board.

1. Go to Boards, and select the Board you want to configure.
2. Go to Configure and select Card layout.

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3. In the "Backlog" select "Requirement Status" and click "Add."
4. In the "Active Sprint" select "Requirement Status" and click "Add."

5

Do you want to customize your Xray experience? Review these configuration details.

Xray is a very flexible tool! Do you want to customize our experience even more? Get together with your Xray users and find out how they want to organize their projects, if they want to customize custom fields, workflows or other settings...

- ☒ **Review Custom Fields to Xray Issue Types** - Check if you need extra custom fields at your Test issue types.

- ☐ **Review Test Steps fields** - Check if you need to add extra info to test steps. By default, Xray has fields like - Action, Data and Expected Results.
- ☐ **Review Test Run Fields** - Check if you need to add extra info to test runs.
- ☐ **Review Test Status** - Check if you want to add any extra Test Status.
- ☐ **Review Test Step Status** - Check if you want to add any extra Test Step Status.
- ☐ **Review Workflows** - Check if you need to have a custom workflow for each Xray Issue types, such as Test.
- ☐ **Review Permissions** - Check if permissions are set accordingly with your team needs.
- ☐ **Review Notifications** - Check if they need extra notifications that by default are disabled.
- ☐ **Review Coverage Settings** - Check if the default coverage settings are suitable for your team.

Explore more in [Administrator Onboarding Course](#)
