Quick Guide for Admin

(i) New Jira UI - 2025

Jira is updating the UI until summer 2025, in case you already have the new UI please check this article : [Xray Cloud] How can I Setup Xray with the New Jira UI (2025)?

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Introduction

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

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

- Which entities must be considered as Requirements and Defects?
- What is the correct project organization for the team? Should there be Tests and Requirements in the same project or in separate projects?

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 QA Guide for Managers
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Configuration

Requirements and Defects

Requirements

First, you need to set which Issue Types are going to be considered Requirements and Defects. This is done at the project level.

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, etc.



On your Jira Cloud instance, go to your Project Settings, then enter Xray Settings and select Test Coverage (Figure 1 - 1).



Perform the desired mapping by dragging the items you want from the Available Issue Types column (Figure 1 - 2) and dropping on the Covered Issue Types column (Figure 1 - 3).

Once you're done, click Save (Figure 1 - 4).

Figure 1 - Coverage

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Defects



On your Jira Cloud instance, go to your Project Settings, then, under Apps (Figure 3 - 1) enter Xray Settings (Figure 3 - 2). Select Add Xray Issue Types (Figure 3 - 3) to automatically add the available Issue Types.

Figure 3 - Settings

If you prefer, you can add Xray Issue Types manually. This will give you more flexibility in choosing the Issue Types that you want to use. \oslash



Customizing your Xray Experience - Configuration Details

Get together with your QA team and 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 for Xray Issue Types check if you need extra custom fields in your Test Issue Types.
- Review Test Steps Fields see if you need to add extra info to the 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 Types** see if you need any extra Test Types.
- Create Test Environments check if your teams needs to create Test Environments.
- Review Test Status see 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 see if you need to have a custom workflow for each Xray Issue Types, such as Test.
- Review Permissions check if Permissions are set according to your team's needs.

(i) Explore more in the Administrator Onboarding Course.

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.