

# Quick Guides

Welcome to Xray! Are you ready to get started?

Select your profile and follow our quick guide.

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## Tester

### Before you start

Before you start, make sure your Jira Admin has performed the basic configuration. If so:

1. You can create issue types like Test, Test Set, Test Plan & Test Execution
2. In your requirements (issue type story or any other that you have set up as a requirement) you will see the "Test Coverage panel."

If you don't see this configuration, ask your Jira Admin to follow this [quick guide](#).

1

#### Create a Test

Start by creating a regular "manual" scripted test case.

1. Click the **Create** button or **Create new** test from the "requirement".

Jira Software

Dashboards

▼

Projects

▼

Issues

▼

Boards

▼

DbConsole

▼

Tests

▼

Create

New filter

«

Find filters

FILTERS

My open issues

Reported by me

All issues

Open issues

Done issues

Viewed recently

Created recently

Resolved recently

Search

Save as

Calculator

▼

Test

▼

Status: All

▼






Assignee: All


▼

Contains text

1-50 of 558

↻

T	Key ↑	Summary	Assignee
	CALC-1	Add two numbers	Unassigned
	CALC-2	Subtract two numbers	Unassigned
	CALC-10	Divide two numbers	Unassigned
	CALC-12	Multiply two numbers	Unassigned
	CALC-16	Multiply two numbers	Unassigned



Calculator / CALC-2630

As a user, I can calculate the sum of two numbers

Edit

Comment

Assign

More ▼

Start Progress


Resolve Issue

Close Issue


Admin ▼

Details

Type:

 Story

Priority:

 Major

Affects Version/s:

None

Component/s:

None

Labels:

None

Requirement Status:

v3.0 - OK

Defects Count :

1

Status:

OPEN

(View Workflow)

Resolution:

Unresolved

Fix Version/s:

v3.0

Description

Click to add description

Test Coverage

Create new Test

Create new Sub Test Exe

2. At Test Details, select Test Type "Manual" and define test steps. You can define the action to be reproduced by the tester, data to be used by the tester, expected results and add attachments.

Book Store / STORE-63

## Check that it is not possible to checkout items that are not in stock

Edit Comment Assign More To Do In Progress Done Admin

**Details**

Type: Test

Priority: Medium

Affects Version/s: None

Component/s: None

Labels: None

**Description**

Click to add description

**Test Details**

Type: Manual

Manual Steps:

Steps dialog Grid

- Action  
Go to test item with id: 2334.
- Attachments (0)
- Action  
Add the item to the shopping cart.
- Attachments (0)
- Action  
In the backoffice application, update the stock to 0 on item
- Attachments (0)
- Action  
Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.
- Attachments (0)

### Edit Issue : STORE-63

Configure Fields

General **Test Details** Test Sets Pre-Conditions Test Plans Link Issues

Test Type: Manual

Choose the Test Type

Steps: Grid

+ Add Step

- Go to test item with id: 2334.
- Add the item to the shopping cart.
- Action**

Style B I U A Link Image Table List Link icon Plus

In the back-office application, update the stock to 0 on item

Visual Text

**Data**  
Enter value...

**Expected Result**  
Enter value...

Done Cancel
- Back in the browser, proceed to checkout. Go through all the steps and confirm the payment method.

Comment

Style B I U A Link Image Table List Link icon Plus

Update Cancel

**Xporter**

Template

Output format: XLSX

Export

**People**

Assignee: Unassigned

Reporter: Admin

Votes: 0

Watchers: 1 Stop

**Dates**

Created: 32 minutes ago

Updated: 32 minutes ago

**Agile**

View on Board

**Hipchat discussions**

Do you want to discuss this issue?

Connect Dismiss

3. Confirm that your Test is linked with a requirement. In order to analyze coverage, you need to link your tests with requirements. Go to Link issues tab, or check it "Issue Links."

# Create Issue

Configure

Project\* Bookstore (BOOK)

Issue Type\* Test

General Test Details Test Sets Pre-Conditions Test Plans Link Issues

Linked Issues tests

Issue

History Search (Showing 1 of 1 matching issues)

BOOK-2 - As a visitor, I can login to Bookstore Website

Create another Create



Bookstore / BOOK-2

## As a visitor, I can login to Bookstore Website

Edit Comment Assign More Close Issue Reopen Issue Admin

### Details

Type: Story Status: RESOLVED (View Workflow)  
Priority: Major Resolution: Fixed  
Affects Version/s: None Fix Version/s: 1.0  
Component/s: Account  
Labels: default  
Epic Link: Manage Account  
Sprint: Sprint 1  
Requirement Status: OK

### Description

Click to add description

### Test Coverage

### Attachments

### Issue Links

tested by  
BOOK-14 Test visitors can login to Bookstore Website

Want to know how to create an automated Test or a generic Test (unstructured)? Check out the Tester Onboarding Course.

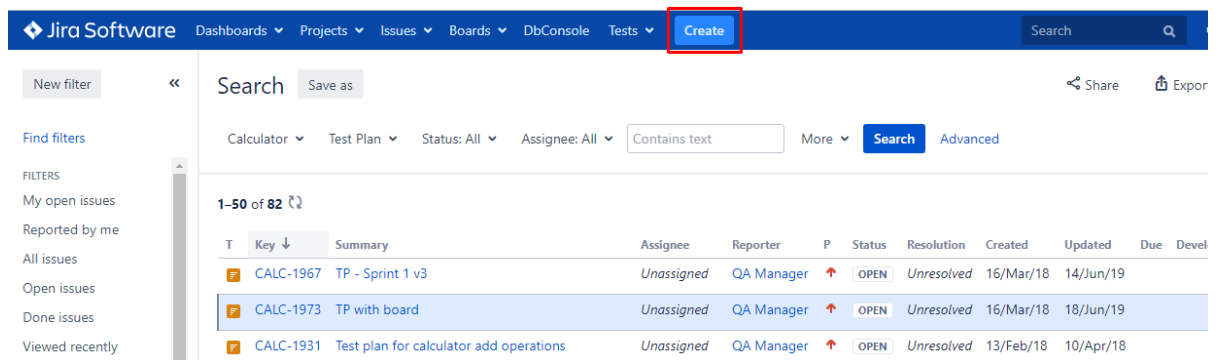
## Plan Tests

### Info




This activity can be performed by a QA Manager, if so, you should ask for the creation of the Test Plans.

With Test Plans you will decide which tests you want to perform, who and when will execute the tests. Also, you may want to prioritize some of the tests and focus on specific requirements. Test Plans are used to define the scope of your testing, track and consolidate the related results, no matter how many times you've run the tests.

1. Click "Create button" and Test Plan issue.




The screenshot shows the Jira Software interface. The top navigation bar includes 'Jira Software', 'Dashboards', 'Projects', 'Issues', 'Boards', 'DbConsole', 'Tests', and a highlighted 'Create' button. Below the navigation bar, the left sidebar shows 'New filter', 'Find filters', and a list of filters. The main content area is titled 'Search' and shows a list of Test Plans. The table below represents the data shown in the screenshot.

T	Key ↓	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due	Devel
	CALC-1967	TP - Sprint 1 v3	Unassigned	QA Manager	↑	OPEN	Unresolved	16/Mar/18	14/Jun/19		
	CALC-1973	TP with board	Unassigned	QA Manager	↑	OPEN	Unresolved	16/Mar/18	18/Jun/19		
	CALC-1931	Test plan for calculator add operations	Unassigned	QA Manager	↑	OPEN	Unresolved	13/Feb/18	10/Apr/18		

2. Besides Summary, you may want to fill out **Fix Version** to indicate that you're tracking the results of the Tests for a specific version. This only makes sense if you are working with versions.

## Create Issue

 Configur






Project\*  Calculator (CALC) ▼

Issue Type\*  Test Plan ▼ 

### General Test Plan Details

Summary\*

Description

Style▼ **B** *I* U A ▼  ▼  ▼  ▼    ▼ + ▼


Visual Text 

Reporter\*  QA Manager

Start typing to get a list of possible matches.

Assignee  Automatic ▼

[Assign to me](#)

Priority  Lowest ▼ 

Affects Version/s  ▼

Start typing to get a list of possible matches or press down to select.


☐ Create another

**Creat**

3. At Test Plan Details you can add Tests at "Tests associated with a Test Plan" or you can do it later at the add button.



1. Inside Test Plan, click on "Create Test Execution."

 [Bookstore](#) / [BOOK-30](#)

## Test Plan for v1.0

[Edit](#) [Comment](#) [Assign](#) [More](#) [Tests Pass](#) [Tests failed](#) [Admin](#)

Details

Type: Test Plan Status: TESTING [\(View Workflow\)](#)  
Priority: Trivial Resolution: Unresolved  
Affects Version/s: None Fix Version/s: 1.0  
Component/s: None  
Labels: default

Description

[Click to add description](#)

Tests

[Test Plan Board](#) [+ Create Test Execution](#) [+ Add](#)

Overall Execution Status

15

PASS


1

FAIL

7

TODO

2. Go to Test Execution, and click on "Execute."

 [Apply Rank](#)

Show 10 entries Columns

	Rank	Key	Summary	Test Type	#Req	#Def	Test Sets	Assignee	Status	
<input type="checkbox"/>	17	BOOK-37	Manual test of password reset procedure	Manual	2	0		user55	TODO	<div><div></div><div>Execi</div><div>EXECUTE</div></div>
		BOOK	Manual test of							

3. You are now at the Test Execution Screen, and here you can follow the test steps and set the execution status: **TODO**, **EXECUTING**, **FAIL**, **ABORTED**, and **PASS**.



Calculator / Test Execution: CALC-49 / Test: CALC-44  
**Square root of integers**

[Return to Test E](#)

**Execution Status** PASS

Started On: 28/Aug/14 1:57 PM    Finished On: 29/Sep/14 10:21 PM

Assignee: Administrator  
Executed By: Administrator  
Tests environments: -

**Comment**    [Preview Comment](#)

This execution has failed with an error! Check the log file.

**Execution Defects (0)**    [Create Defect](#)   [Create Sub-Task](#)   [Add Defects](#)

**Execution Evidences (0)**

**Execution Details**

**Test Description**  
This tests the square root operation of integers

**Test Issue Links (2)**  

created	<span style="color: red;">■</span> CALC-52	Error calculating the square root of integers
tests	<span style="color: green;">■</span> CALC-33	Square root operation

**Test Steps (3)**

<b>1</b>	<b>Step</b> I choose the <b>square root</b> operation on the calculator	<b>Data</b>	<b>Expected Result</b> The operation must appear selected
	<a href="#">Actual Result</a> <a href="#">Comment</a> <a href="#">Defects</a> (0) <a href="#">Evidence</a> (0) <b>Step State</b> <span style="color: green;">PASS</span>		
<b>2</b>	<b>Step</b> I enter an integer into the calculator	<b>Data</b> I = 9	<b>Expected Result</b>
	<a href="#">Actual Result</a> <a href="#">Comment</a> <a href="#">Defects</a> (0) <a href="#">Evidence</a> (0) <b>Step State</b> <span style="color: green;">PASS</span>		
<b>3</b>	<b>Step</b> I press the <i>Calculate</i> button	<b>Data</b>	<b>Expected Result</b> The result <b>3</b> must be displayed in the screen, at the sign
	<a href="#">Actual Result</a> <a href="#">Comment</a> <a href="#">Defects</a> (0) <a href="#">Evidence</a> (0) <b>Step State</b> <span style="color: green;">PASS</span>		

4. Did you find a defect and want to report it? Create Defects from the Test Execution Screen, click "Create Defect".

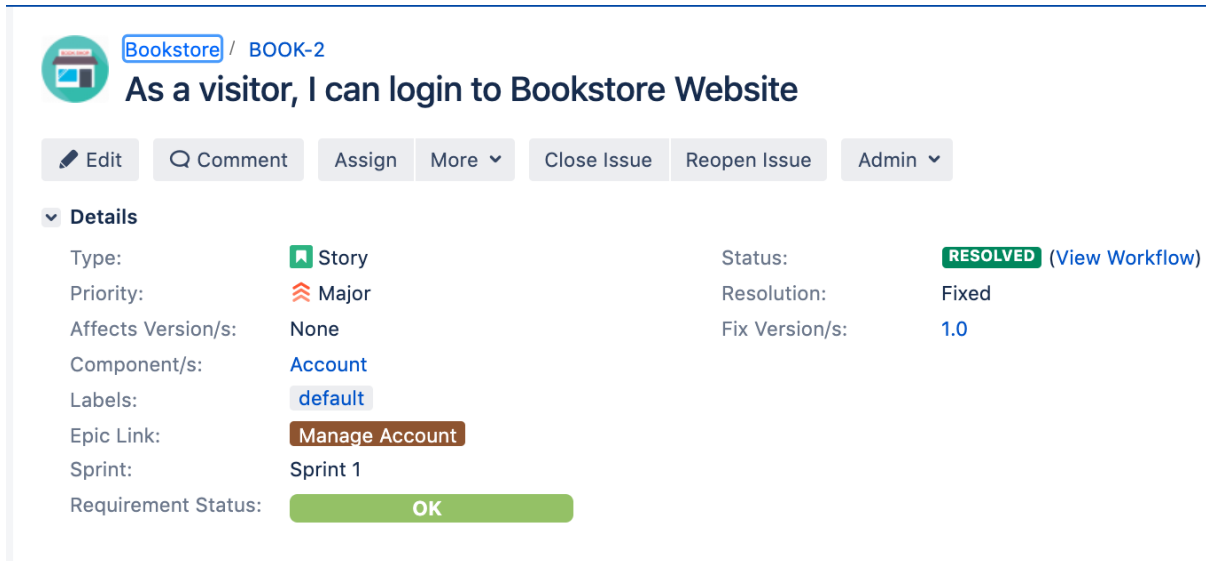
**Execution Defects (0)**    [Create Defect](#)   [Create Sub-Task](#)   [Add Defects](#)

Besides defects, you can also add evidence of your test results, at "Evidence".

## 4

## Analyse results

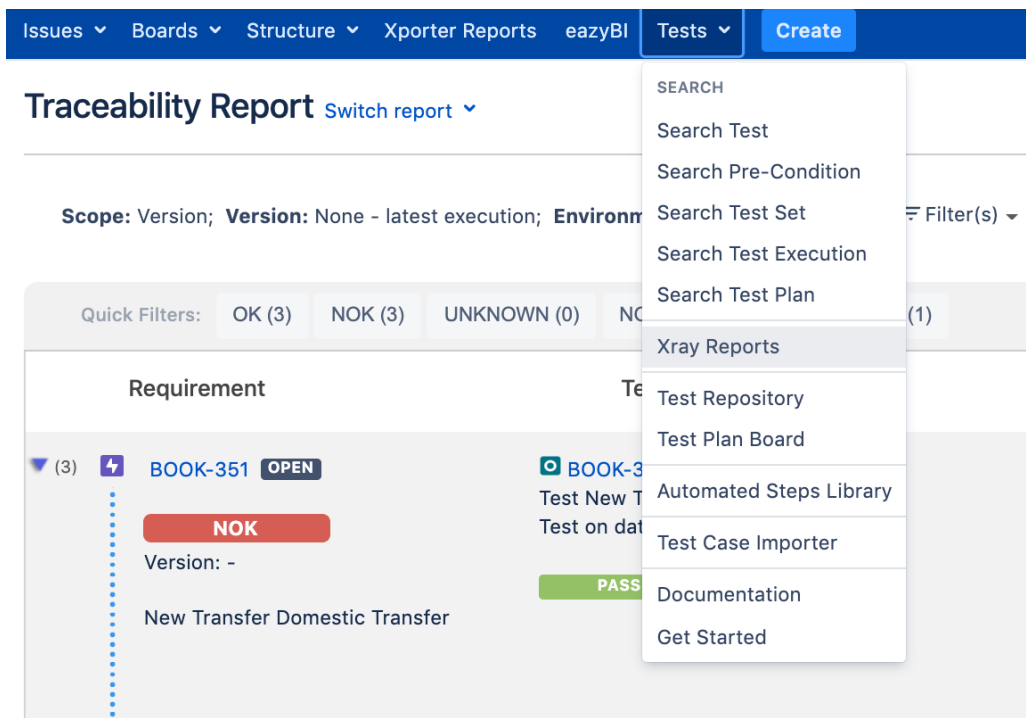
1. Go to the requirement and check the Requirement Status.



The screenshot shows a requirement card for 'Bookstore / BOOK-2' with the title 'As a visitor, I can login to Bookstore Website'. The card has a toolbar with buttons: Edit, Comment, Assign, More, Close Issue, Reopen Issue, and Admin. Below the toolbar is a 'Details' section with the following information:

Type:	Story	Status:	RESOLVED (View Workflow)
Priority:	Major	Resolution:	Fixed
Affects Version/s:	None	Fix Version/s:	1.0
Component/s:	Account		
Labels:	default		
Epic Link:	Manage Account		
Sprint:	Sprint 1		
Requirement Status:	OK		

2. Go to Xray Reports and select the report you want to see.



The screenshot shows the Xray Reports interface. The top navigation bar includes 'Issues', 'Boards', 'Structure', 'Xporter Reports', 'easyBI', 'Tests', and a 'Create' button. The main section is titled 'Traceability Report' with a 'Switch report' dropdown. Below this, there's a 'Scope' section with 'Version: None - latest execution; Environment:'. A 'Quick Filters' section shows 'OK (3)', 'NOK (3)', and 'UNKNOWN (0)'. The main content area displays a 'Requirement' card for 'BOOK-351' with a status of 'NOK' and a version of '-'. The card also shows 'New Transfer Domestic Transfer' and a 'PASS' status. A dropdown menu is open, showing options: 'SEARCH', 'Search Test', 'Search Pre-Condition', 'Search Test Set', 'Search Test Execution', 'Search Test Plan', 'Xray Reports', 'Test Repository', 'Test Plan Board', 'Automated Steps Library', 'Test Case Importer', 'Documentation', and 'Get Started'.

You can analyze the status of your project from two different perspectives:

- **Based on requirements:** you have reports such as **Overall Test Coverage** or **Traceability Report** which provide insight into the status of requirements.
  - **Based on Tests:** which look directly at related Test artefacts such as Tests, Test Sets, Test Plans and Test Executions. Xray also provides reports with metrics for these entities.
- 

## Learn More

This is just a start! There is so much more to learn and to explore about Xray.

You may want to learn more about:

- How to create automated & generic tests
- How to use preconditions
- How to work with Test environments
- Understand how coverage works

Take the onboarding [Tester course](#) for a deeper understanding.

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## QA Manager

1

Decide your project organization strategy

Select the best approach to match your QA strategy with Jira project configuration.

	Advantages	Disadvantages
<b>All-in-one project</b> Requirements, Defects & Tests in the same Jira project	<ul style="list-style-type: none"><li>✔ Info all together and visible to the whole team</li><li>✔ Same context - testers &amp; dev</li><li>✔ Less administration effort</li><li>✔ Simple to understand</li></ul>	<ul style="list-style-type: none"><li>✘ Extra info that may be confusing to the team</li></ul>
<b>Separated projects</b> Separate Tests from Requirements and Defects	<ul style="list-style-type: none"><li>✔ Dedicated project for Testers</li><li>✔ Less information inside the project</li><li>✔ Permissions can be more granular</li></ul>	<ul style="list-style-type: none"><li>✘ Extra administration effort</li><li>✘ May promote team divide</li></ul>

If you want to go for the easiest and simplest approach go for - the all-in-one project.

2

## Share your strategy with your Jira Admin

Once you know how you will organize your project, share your choice with your Jira admin and ask them to perform the needed actions for setup:

- Enable Xray for existing projects or
- Create new projects

3

## Select your Planning Strategy

When designing your planning strategy you will decide which tests you want to perform, and who and when will execute the tests. Also, you may want to prioritize some of the tests and focus on specific requirements.

Your planning strategy must reflect your methodology, here are some options:

✔ SCRUM based approach - Create one Test Plan per Sprint

✔ Feature Approach - Create one Test Plan for the features (maybe epics in Jira) you are able to address at your WIP. More suitable to Kanban.

✔ Release Approach - Create one Test Plan per release (Fix version in Jira) or interim release/milestone. More suitable to waterfall methodology.

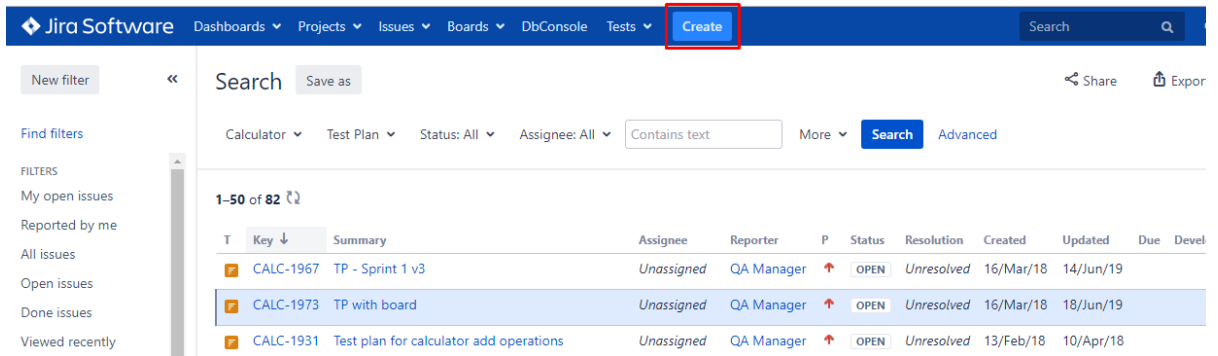
✔ Test Categories Approach - Create one Test Plan per category of tests, for example, Regression Tests, Security Tests, Non-functional tests.

Check the next step to see how to Create a Test Plan.

## Create Test Plan

Now that you have decided your test planning strategy you can create your first Test Plan.

1. Click "Create button" and Test Plan issue.



The screenshot shows the Jira Software interface. The top navigation bar includes the Jira logo and various menu items: Dashboards, Projects, Issues, Boards, DbConsole, Tests, and a highlighted 'Create' button. Below the navigation bar, the left sidebar shows filter options like 'My open issues', 'Reported by me', 'All issues', 'Open issues', 'Done issues', and 'Viewed recently'. The main content area is titled 'Search' and shows a list of issues. The 'Create' button is highlighted with a red box. The search results table shows three issues related to 'Test Plan'.


T	Key ↓	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due	Devel
	CALC-1967	TP - Sprint 1 v3	Unassigned	QA Manager	↑	OPEN	Unresolved	16/Mar/18	14/Jun/19		
	CALC-1973	TP with board	Unassigned	QA Manager	↑	OPEN	Unresolved	16/Mar/18	18/Jun/19		
	CALC-1931	Test plan for calculator add operations	Unassigned	QA Manager	↑	OPEN	Unresolved	13/Feb/18	10/Apr/18		

2. Besides Summary, you may want to fill out **Fix Version** to indicate that you're tracking the results of the Tests for a specific version. This only makes sense if you are working with versions.

## Create Issue

[Configure](#)






Project\*  Calculator (CALC) ▼

Issue Type\*  Test Plan ▼ [?](#)

### General Test Plan Details

Summary\*

Description

Style▼ **B** *I* U A ▼  ▼  ▼    ▼ + ▼

Visual Text

Reporter\*  QA Manager

Start typing to get a list of possible matches.

Assignee  Automatic ▼

[Assign to me](#)


Priority  Lowest ▼ [?](#)

Affects Version/s  ▼

Start typing to get a list of possible matches or press down to select.

☐ Create another [Creat](#)

3. At Test Plan Details you can add Tests at "Tests associated with a Test Plan" or you can do it later at the add button.


[Bookstore](#) / [BOOK-30](#)

## Test Plan for v1.0

Edit

Comment

Assign

More

Tests Pass

Tests failed

Admin

Details

Type:

Priority:

Affects Version/s:

Component/s:

Labels:

Test Plan

Trivial

None

None

default

Status:

Resolution:

Fix Version/s:

TESTING (View Workflow)

Unresolved

1.0

Description

Click to add description

Tests

Test Plan Board

Overall Execution Status

15 PASS

1 FAIL

Total Tests: 16

Info

In order to add Tests to your Test Plan, you need to have them created beforehand. Learn more in our [Tester Onboarding Course](#).

## Explore possibilities to organize your Tests

- **Test Repository** - is a project page which enables the hierarchical organization of Tests at the project level by allowing you to organize Tests in folders and sub-folders. You can also perform several actions from this page including, creating new Tests, creating new Test Plans, Test Sets, Test Executions for a group of Tests, etc. This is the recommended approach whenever you have a large number of Tests and want to manage them more effectively.

- **Test Set** - is an issue type for organizing tests, and it is a flat list of Tests and is a simple way to create different groups of Tests. You can easily select them when creating Tests Plans or Test Executions.

## 6

### Select your favorite reports

Xray provides several ways to make it easier for the entire team to have a clear view of the overall readiness of the project.

As part of your daily tasks, use the dedicated reports and gadgets available in your customized dashboard to evaluate your testing progress.

The most popular reports are:

Report	What do you get
Overall Requirement Coverage Report	<p>Provides the coverage status of requirements for some given context (i.e. Version/Test Plan).</p> <ul style="list-style-type: none"><li>• Analysis can be done by "Version" or by "Test Plan" and on a given Test Environment</li><li>• Takes into account results performed on that scope</li><li>• Groups requirements by component, priority, etc</li></ul>
Traceability Report	<p>Shows the requirement traceability, from requirements to defects.</p> <p>This helps you analyze the requirements and related Tests, Test Runs and defects, so you can quickly identify uncovered or incomplete/faulty requirements.</p>
Test Plans Report	<p>Shows a list of Test Plans with consolidated information for each one, such as test statuses count, overall progress and Test Environments metrics.</p>
Test Executions Report	<p>Shows a list of Test Executions with some metrics related with each execution, such as the tests count per run status, per test type, overall progress and linked defects</p>
Historical Requirement Coverage	<p>Shows the evolution of the requirements coverage status for the given period.</p> <p>The number of requirements may be analyzed by percentage or absolute values.</p>



If you want to analyze the current status of your release, you might find it useful to check the Overall Requirements Coverage Report and the Traceability Report. You might also use these reports to perform an analysis by Test Plan, in that case it only takes into account results performed on that scope of the test plan.

1. Go to Xray Reports and select the report you want to see.



Issues ▾Boards ▾Structure ▾Xporter ReportseasyBITests ▾Create

Traceability Report [Switch report ▾](#)

Scope: Version; Version: None - latest execution; Environment: Filter(s) ▾

Quick Filters: OK (3)NOK (3)UNKNOWN (0)NC (1)

Requirement

(3) BOOK-351 **OPEN**

NOK

Version: -

New Transfer Domestic Transfer

BOOK-3

Test New T

Test on dat

PASS

SEARCH

Search Test

Search Pre-Condition

Search Test Set

Search Test Execution

Search Test Plan

Xray Reports

Test Repository

Test Plan Board

Automated Steps Library

Test Case Importer

Documentation

Get Started

Explore and learn more by taking the [QA Manager onboarding course](#).

## 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?

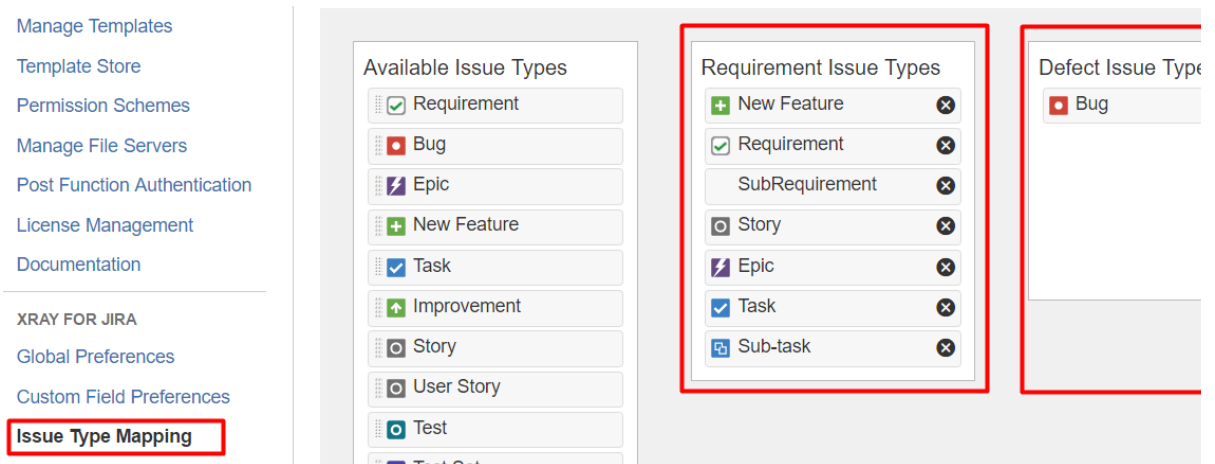
Check [QA Manager quick guide](#) to get more info on this.

# 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."



#### 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.

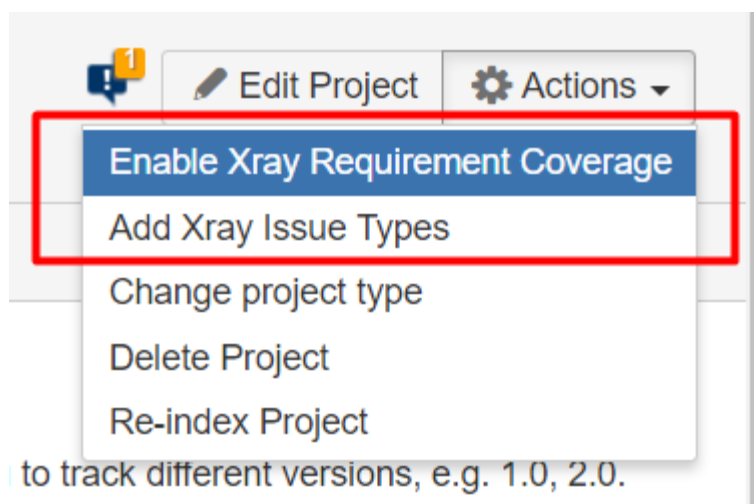
**Defects** are identified during Tests Executions, and represent a condition in the system that does not meet the requirement or end-user expectations. Example: Defect, Bug, Fault, and others.

## 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

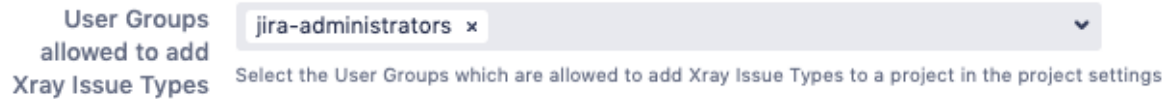
### Add Xray issue types to your schemes

**i 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".



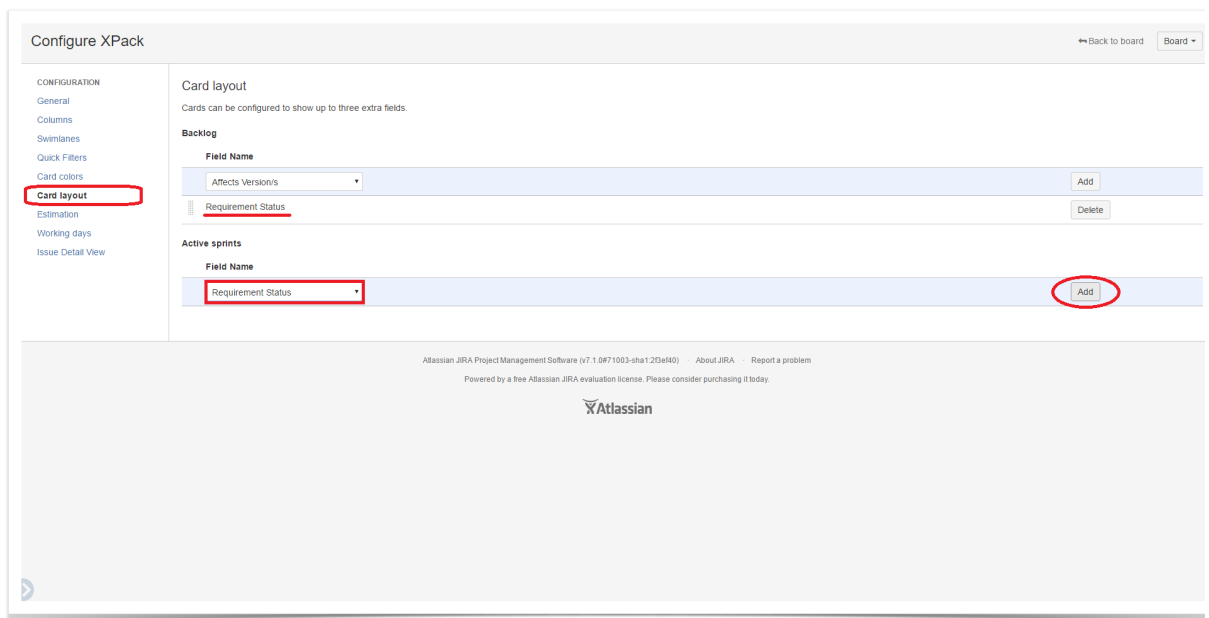
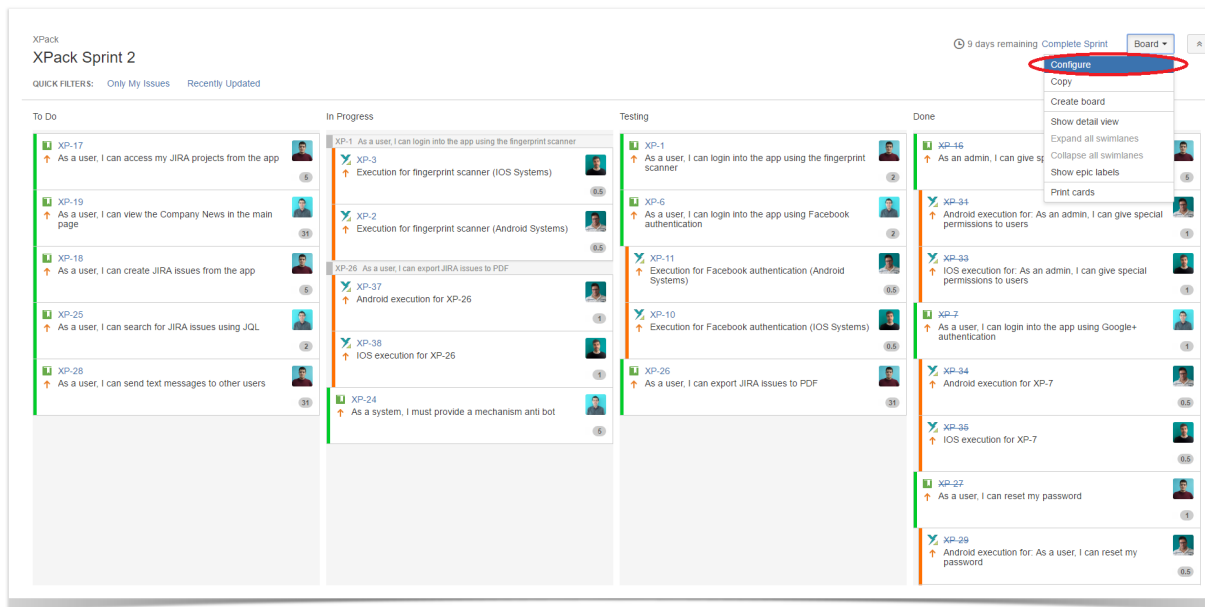
**✓** Your Issue Type Schemes & Issue Type Screen Schemes are going to be changed by this operation. Don't forget that the schemes may be shared with other projects.

## 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.



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

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](#)

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