

Configuring Xray with an Existing Project

When you purchase or try Xray, often you already have one or more projects you're working on and you want to test. This following guides you through the steps that must be done in order to configure an existing project, whether you have a vanilla Project or a highly customized one.

- [Adding Default Xray Schemes to the Project](#)
 - [Issue Type Scheme](#)
 - [Issue Type Screen Scheme](#)
- [Modify your Current Project Schemes](#)
 - [Edit Issue Type Scheme and add Xray Issue Types](#)
 - [Edit Issue Type Screen Scheme](#)
- [Troubleshooting](#)

When you create a project in Jira, this is most likely the screen you see in the Project Settings page. In order to enable the Xray components, you must configure the correct project schemes using this page.

The screenshot shows the Jira Project Settings page for a project named 'Calculator'. The left sidebar contains navigation links for various project settings: Summary, Details, Audit log, Re-index project, Delete project, Issue types, Workflows, Screens, Fields, Priorities, Versions, Components, Users and roles, Permissions, Issue Security, Notifications, Project links, Xporter, Templates, Scheduled Reports, and Permission Schemes. The main content area is divided into several sections: 'Issue types' (showing the 'CALC: Scrum Issue Type Scheme' with options for Bug, Epic, Story, Sub-task, and Task), 'Workflows' (showing the 'CALC: Software Simplified Workflow Scheme'), 'Screens' (showing the 'CALC: Scrum Issue Type Screen Scheme' as the default), 'Versions' (indicating no unarchived versions), 'Components' (indicating no components), 'Roles' (showing the Project Lead as 'Sofia Neto'), and 'Permissions' (showing the 'Default software scheme' with no issues).

You have two options to configure an existing project for Testing with Xray:

1. Adding Default Xray Schemes to the Project
2. Modifying your Current Project Schemes

Adding Default Xray Schemes to the Project

Xray provides default configuration schemes that you can directly associate with your project. You can customize these default Xray schemes but keep in mind that any change will affect *all* projects that are using these schemes. One advantage of creating a new Test Project using the Xray project template is that it will create dedicated schemes for the project being created.

Issue Type Scheme

One way to set Xray as part of your project is to simply replace the Project Specific Issue Type Scheme with **Default Issue Type Scheme**, where all Xray issue type have been added at installation time. To do this,

- Click on the Issue Type Scheme link that is on top of the page. The page below will appear.
- Click on Actions -> Use a different scheme and choose **Default Issue Type Scheme**.

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Issue types

These issue types are available in your project. Each issue type can be configured differently.
The issue type scheme defines which issue types apply to this project. To change the issue types used, you can select a different issue type scheme, or modify the current scheme.
[Learn more about Issue Types](#)

Actions

Edit issue types
Use a different scheme

Scheme used by this project: CALC: Scrum Issue Type Scheme

Issue Type	Description	Workflow	Field configuration	Screen
Story	Created by Jira Software - do not edit or delete. Issue type for a user story.	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Bug	A problem which impairs or prevents the functions of the product.	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Bug Screen
Epic	Created by Jira Software - do not edit or delete. Issue type for a big user story that needs to be broken down.	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Task	A task that needs to be done.	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Sub-task	The sub-task of the issue	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen

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Select Issue Type Scheme for project Calculator

Please associate the project Calculator with an issue type scheme. If you know the name of the scheme you need, you can select an issue type scheme directly. You can also select the issue type scheme to be the same as another project or create your own new scheme.

There are 8 issues in the project. The current scheme is **CALC: Scrum Issue Type Scheme**.

Choose an existing issue type scheme

Choose a scheme the same as an existing project

Create a new scheme and associate with current project

Issue Type Scheme

Default Issue Type Scheme
CALC: Scrum Issue Type Scheme
CON: Xray Issue Type Scheme
GO: Xray Issue Type Scheme
POOF: Scrum Issue Type Scheme
TESTS: Jira Service Management Issue Type Scheme (1)
TEST: Scrum Issue Type Scheme

Please select...

Project: Calculator

Issue Type Scheme: CALC: Scrum Issue Type Scheme

Project: Calculator

Issue Type Scheme: New issue type scheme for project Calculator
NOTE: You can change the name after you've created the scheme

Issue Types for Scheme

Test
Test Set
Test Execution
Pre-Condition

Select issue types for your new scheme

Issue Types for Scheme:

Task
Sub-task (sub-task)
Story
Bug
Epic

OK Cancel

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Issue types

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The issue type scheme defines which issue types apply to this project. To change the issue types used, you can select a different issue type scheme, or modify the current scheme.
[Learn more about Issue Types](#)

Actions

Scheme used by this project: Default Issue Type Scheme

Issue Type	Description	Workflow	Field configuration	Screen
Epic	Created by Jira Software - do not edit or delete. Issue type for a big user story that needs to be broken down.	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Pre-Condition	Represents a Pre-Condition	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Story	Created by Jira Software - do not edit or delete. Issue type for a user story	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Test	Represents a Test	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Test Execution	Represents a Test Execution	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Test Plan	Represents a Test Plan	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Test Set	Represents a Test Set	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen
Sub-Test Execution	Represents a Sub Test Execution	Software Simplified Workflow for Project CALC	Default Field Configuration	CALC: Scrum Default Issue Screen

Issue Type Screen Scheme

Once the Issue Type Scheme is configured, you have to configure the Issue Type Screen Scheme. To do this,

- Click on the project's Issue Type Screen Scheme link you see below the screen section
- Click on Actions -> Edit Screens
- Associate an Issue Type with a Screen Scheme
- Choose **Test** for Issue type and **Default Xray Test Screen Scheme**
- Repeat this action for **Pre-Condition** with **Default Xray Pre-Condition Screen Scheme**, **Test Plan** with **Default Xray Test Plan Screen Scheme**, **Test Execution** with **Default Xray Test Execution Screen Scheme**, **Sub-Test Execution** with **Default Xray Sub-Test Execution Screen Scheme** and **Test Set** with **Default Xray Test Set Screen Scheme**

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Screens

Edit your project's screens
Screens group together the fields that are visible on an issue type. You can change which fields are visible by editing the screen, providing the screen isn't shared with other projects. To do so, select a screen and start editing. Check out our [screens documentation](#) for more info.

A screen defines how fields are displayed for an issue. Different screens can be used when an issue is created, viewed, edited, or transitioned through a workflow. The screen scheme defines which screens apply to each issue type. To change the screens used, you can select a different screen scheme, or modify the current scheme. [Learn more about Screens](#)

Scheme used by this project: **CALC: Scrum Issue Type Screen Scheme**

CALC: Scrum Default Screen Scheme **Default**

These 8 issue types... use this screen scheme

Issue Type	Screen
Create Issue	CALC: Scrum Default Issue Screen
Edit Issue	CALC: Scrum Default Issue Screen
View Issue	CALC: Scrum Default Issue Screen

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Configure Issue Type Screen Scheme: CALC: Scrum Issue Type Screen Scheme

Used by 1 project

Associate an issue type with a screen scheme

This scheme can be used by one or more projects, the [Screen Scheme](#) specified for each issue type will be applied to the issues in these projects. The Default entry specifies which Screen Scheme will be used for any issue type that has not been explicitly mapped to a screen scheme. [View all issue type screen schemes](#)

Issue Type	Screen Scheme	Actions
Default Used for all unmapped issue types.		Edit
Bug		Edit Delete

Associate an Issue Type with a Screen Scheme

Issue Type: Test Execution
Screen Scheme: Default Xray Test Execution Screen
Add Cancel

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Issue Type	Screen Scheme	Actions
Default Used for all unmapped issue types.	CALC: Scrum Default Screen Scheme	Edit
Bug	CALC: Scrum Bug Screen Scheme	Edit Delete
Test	Default Xray Test Screen Scheme	Edit Delete
Test Set	Default Xray Test Set Screen Scheme	Edit Delete
Test Execution	Default Xray Test Execution Screen Scheme	Edit Delete
Pre-Condition	Default Xray Pre-Condition Screen Scheme	Edit Delete
Test Plan	Default Xray Test Plan Screen Scheme	Edit Delete
Sub Test Execution	Default Xray Sub Test Execution Screen Scheme	Edit Delete



Your project is now ready to use Xray.

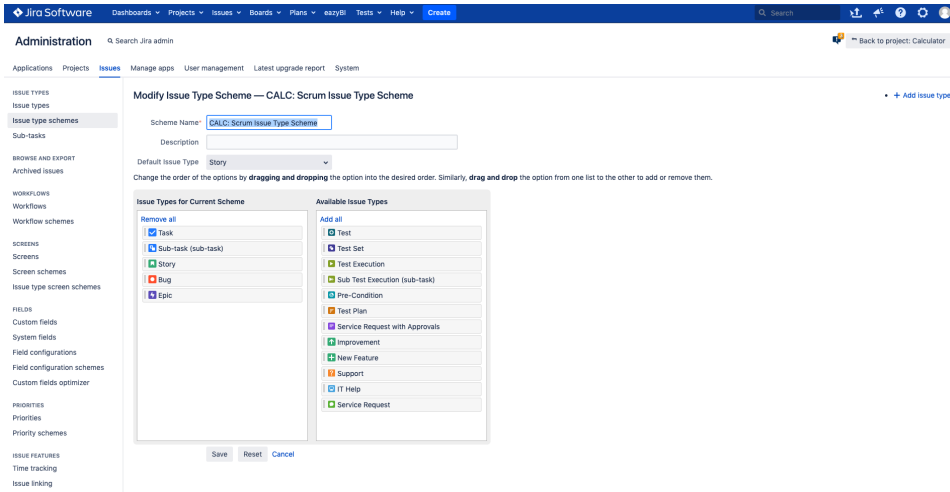
Modify your Current Project Schemes

In case you have highly customized schemes for your projects and you do not want to use the default schemes provided by Xray, you must perform some customizations.

Edit Issue Type Scheme and add Xray Issue Types

You must edit your project's issue type scheme and add the Xray issue types:

- Click on the Issue Type Scheme link you see on top of the page
- Click on Edit issue types
- Add **Test**, **Test Set**, **Pre-Condition**, **Test Execution**, **Sub-Test Execution** and **Test Plan**



Edit Issue Type Screen Scheme

Once the Issue Type Scheme is configured, you have to configure the Issue Type Screen Scheme. To do this,

- Click on the project's Issue Type Screen Scheme link you see below the screen section
- Click on Actions -> Edit Screens
- Associate an Issue Type with a Screen Scheme
- Choose **Test** for Issue type and **Default Xray Test Screen Scheme**
- Repeat this action for **Pre-Condition** with **Default Xray Pre-Condition Screen Scheme**, **Test Plan** with **Default Xray Test Plan Screen Scheme**, **Test Execution** with **Default Xray Test Execution Screen Scheme**, **Sub-Test Execution** with **Default Xray Sub-Test Execution Screen Scheme** and **Test Set** with **Default Xray Test Set Screen Scheme**

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Summary

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Screens group together the fields that are visible on an issue type. You can change which fields are visible by editing the screen, providing the screen isn't shared with other projects. To do so, select a screen and start editing. Check out our [screens documentation](#) for more info.

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A screen defines how fields are displayed for an issue. Different screens can be used when an issue is created, viewed, edited, or transitioned through a workflow. The screen scheme defines which screens apply to each issue type. To change the screens used, you can select a different screen scheme, or modify the current scheme. [Learn more about Screens](#)

1 Scheme used by this project: CALC: Scrum Issue Type Screen Scheme

CALC: Scrum Default Screen Scheme **Default**

These 8 issue types... use this screen scheme

Issue Type	Screen
Pre-Condition	CALC: Scrum Default Issue Screen
Story	CALC: Scrum Default Issue Screen
Test	CALC: Scrum Default Issue Screen
Test Execution	CALC: Scrum Default Issue Screen
Test Plan	CALC: Scrum Default Issue Screen
Test Set	CALC: Scrum Default Issue Screen
Sub-Test Execution	CALC: Scrum Default Issue Screen

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Configure Issue Type Screen Scheme: CALC: Scrum Issue Type Screen Scheme

USED BY 1 PROJECT

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Issue Type	Screen Scheme	Actions
Default Used for all unmapped issue types.		Edit
Bug		Edit Delete

Associate an Issue Type with a Screen Scheme

Issue Type: Test Execution
Screen Scheme: Default: Xray Test Execution Screen
Add Cancel

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Configure Issue Type Screen Scheme: CALC: Scrum Issue Type Screen Scheme

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Issue Type	Screen Scheme	Actions
Default Used for all unmapped issue types.	CALC: Scrum Default Screen Scheme	Edit
Bug	CALC: Scrum Bug Screen Scheme	Edit Delete
Test	Default: Xray Test Screen Scheme	Edit Delete
Test Set	Default: Xray Test Set Screen Scheme	Edit Delete
Test Execution	Default: Xray Test Execution Screen Scheme	Edit Delete
Pre-Condition	Default: Xray Pre-Condition Screen Scheme	Edit Delete
Test Plan	Default: Xray Test Plan Screen Scheme	Edit Delete
Sub-Test Execution	Default: Xray Sub Test Execution Screen Scheme	Edit Delete

i You project is now ready to use Xray.

Troubleshooting

"I see Xray issue types, but I don't get screens with specific issue type information."

Create Issue

[Configure Fields](#)

All fields marked with an asterisk (*) are required

Project*  Calculator (CALC) ▼

Issue Type*  Test ▼ ⓘ

[General](#) [Test Details](#) [Test Sets](#) [Pre-Conditions](#) [Test Plans](#) [Link Issues](#)

Summary*

Description

Style ▼

B *I* U A ▼         

Visual

Text

Reporter*  Sofia Neto ▼

Start typing to get a list of possible matches.

Assignee  Automatic ▼
[Assign to me](#)

Fix Version/s

None

Priority  Low ▼ ⓘ

Component/s

None

☐ Create another [Create](#) [Cancel](#)

❗ You have configured Issue Type Scheme, but not the Issue Type Screen Scheme.

✅ Follow this tutorial instructions to configure the Issue Type Screen Scheme in your project.