

# 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 the team? Should there be Tests and Requirements in the same project or in separate projects?

Check the [QA Manager getting started](#) to get more info on this.

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## Configure Requirements & Defects

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

### 1. Access your **Project Settings > Xray Settings > Test Coverage**

The screenshot shows the Xray Project Settings interface for a project named 'Book Store' (Software project). The left sidebar contains a navigation menu with options like 'Back to project', 'Project settings', 'Details', 'People', 'Automation', 'Summary', 'Issue types', 'Issue layout', 'Workflows', 'Screens', 'Fields', 'Code', 'Deployments', 'Versions', 'Components', 'Opsgenie', 'Permissions', 'Issue security', 'Notifications', 'Development tools', 'Issue collectors', 'Slack integration', and a footer note 'You're in a company-managed project' with a 'Learn more' link. The main content area is titled 'Xray Settings' and has a sub-section 'Test Coverage' selected. Below this, there's a 'Test Coverage' section with a description: 'A testable/coverable entity is an issue that you can cover with tests in order to validate its acceptance criteria. It can be a Story, custom issue type such as a Requirement.' This section contains two panels: 'Available Issue Types' and 'Coverable Issue Types'. The 'Available Issue Types' panel lists various issue types with checkboxes: Task (checked), Sub-task, Bug, Epic, Sub Test Execution, Precondition, Test, Test Plan, Test Execution, and Test Set. The 'Coverable Issue Types' panel shows 'Story' as a selected coverable issue type. Below these panels, there are configuration options for 'Test Coverage Hierarchy' with two checked checkboxes: 'Epic - Issues(Stories) relation' and 'Issue - Sub-tasks relation'. Each checkbox has a descriptive text explaining its function. There is also an 'Issue Links relation' dropdown menu set to 'Select...' and an 'Issue Link Type Direction' section with radio buttons for 'Outward' (selected) and 'Inward'. A 'Save' button is located at the bottom right of the configuration area.

Perform the desired mapping and click "Save."

## 2. Access your **Project Settings > Xray Settings > Defect Mapping**

The screenshot shows the Xray web interface. On the left is a sidebar with a project menu for 'Book Store' (Software project). The menu includes options like 'Back to project', 'Project settings', 'Details', 'People', 'Automation', 'Summary', 'Issue types', 'Issue layout', 'Workflows', 'Screens', 'Fields', 'Code', 'Deployments', 'Versions', 'Components', 'Opsgenie', 'Permissions', 'Issue security', 'Notifications', 'Development tools', 'Issue collectors', 'Slack integration', and a note 'You're in a company-managed project' with a 'Learn more' link. The main area is titled 'Xray Settings' and contains a list of settings: Summary, Miscellaneous, Test Coverage, Defect Mapping (highlighted), Test Types, Test Environments, Document Generator, Test Step Fields, Test Run Custom Fields, Parameter value lists, Default Column Layouts, and Re-Indexing. The 'Defect Mapping' section is expanded, showing a title 'Defect Mapping' and a description: 'A defect represents an error, flaw, failure or fault in the SUT (System Under Test) that produces an incorrect or All the issue types mapped as Defect Entities are handled as defects.' Below this is a configuration area with two panels: 'Available Issue Types' and 'Defect Issue Types'. The 'Available Issue Types' panel lists 13 issue types with checkboxes: Task, Sub-task, Story, Epic, Sub Test Execution, Precondition, Test, Test Plan, Test Execution, and Test Set. The 'Defect Issue Types' panel shows a single mapped issue type: Bug. A 'Save' button is located at the bottom right of the configuration area.

Perform the desired mapping and click "Save."

### 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's expectations.

Examples: Defect, Bug, Fault and others.

## Add Xray Issue Types to your schemes

You may want to include Xray Issue Types (such as Test, Test Plan, Test Set, Test execution) to your already created Issue Type Schemes and Issue Type Screen Schemes.

1. Access your **Project Settings > Xray Settings > Summary** and select the **Add Xray Issue Types**.

### Xray Settings

- Summary
- Miscellaneous
- Test Coverage
- Defect Mapping
- Test Types
- Test Environments
- Document Generator
- Test Step Fields
- Test Run Custom Fields
- Default Column Layouts
- Re-Indexing

### Summary













This page contains a brief summary of the Xray configurations for this project.

#### Issue Types

**Xray Issue Types in Project**

There are 0 Xray issue types configured for this project. In order to enable this project for testing with Xray, you need to configure the issue types there. You can do it automatically by pressing "Add Xray Issue Types" or manually by going into the issue type scheme for this project and adding issue types there.

[Add Xray Issue Types](#) · [Configure the Issue Type Scheme manually](#)

Name	Description	Pr
 Test	This is the Xray Test Issue Type	
 Precondition	This is the Xray Pre-Condition Issue Type	
 Test Set	This is the Xray Test Set Issue Type	
 Test Plan	This is the Xray Test Plan Issue Type	
 Test Execution	This is the Xray Test Execution Issue Type	
 Sub Test Execution	This is the Xray Sub Test Execution Issue Type	



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

To add issue types manually, you can click on **Configure the Issue Type Scheme manually** available on the **Summary** section within the projects settings or access the issue type scheme on Jira settings.

After editing the issue type scheme, you must drag and drop Xray Issue Types: Test, Test Plan, Test Set, Test Execution, Precondition and Sub Test Execution to "Issue Types for Current Scheme" and then click "Save".

## Issues

### Modify Issue Type Scheme — STORE: Scrum Issue Type Scheme (1)

SHARED BY 1 PROJECT

Scheme Name\*

STORE: Scrum Issue Type Scheme (1)

Description

Default Issue Type

Story

Change the order of the options by **dragging and dropping** the option into the desired order. Similarly, **drag and drop** the option from one list to the other to add or remove.

#### Issue Types for Current Scheme

Remove all

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

#### Available Issue Types

Add all

- ☐ Sub Test Execution (sub-task)
- ☐ Precondition
- ☐ Test
- ☐ Test Plan
- ☐ Test Execution
- ☐ Test Set

Save

Reset

Cancel



For Team-managed Projects you need to create Issue Types manually and then map them with Xray Entities in **Xray Settings > Issue Types Mapping**. Learn more in ["Administrator Onboarding Course."](#)

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

Xray is a very flexible tool! Do you want to customize your 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 for Xray Issue Types** - Check if you need extra custom fields in 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 Types** - Check if you need any extra Test Types.
- ☐ **Create Test Environments** - Check if your teams needs to create Test Environments.
- ☐ **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 according to your team's needs.

Explore more in [Administrator Onboarding Course](#)

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