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.

1

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**

Perform the desired mapping and click "Save."

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

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.

2 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
> You can do it automatically by pressing "Add Xray Issue Types" or manually by going into the issue type scheme for this project and ac
> 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 r

Issue Types for Current Scheme	Available Issue Types
Remove all	Add all
☑ Task	Sub Test Execution (sub-task)
Sub-task (sub-task)	Precondition
Story	Test
Bug	Test Plan
Epic	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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③ 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