Configuring Test Management for Jira

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Jira Global Settings

Head to Test Management Global Settings by clicking on the gear-shaped icon, located on the upper right corner and then on Test Management for Jira.

Project administration

Enable or disable Test Management for the projects available on Jira individually or in bulk. Note: you can disable Test Management any time, without losing data.
Analytics

Analytics collects anonymous usage statistics about Test Management for Jira and sends it to Adaptavist for our internal use only. It will help us improve the product and provide you with new features. Please see our EULA and Privacy Policy for details. *Analytics is enabled by default.*

Global access restrictions

Global access restrictions allow you to define which user can access Test Management. By default access is enabled for everybody, however, you can restrict the access only for the users in the listed groups and roles.
Manage projects restrictions

Manage projects restrictions allow you to define which user can manage project settings. By default, users with the Project Administrator role have permission to manage project settings, however, you can restrict the access only for the users in the listed groups and roles.

Time and Date Formats

Test Management for Jira (TM4J) uses the same time and date format configured in Jira. Jira system administrators can configure the format in the Look and Feel page. It allows you to customize the way times and dates are presented to users throughout the TM4J and Jira user interface.

Head to Administration > System page.
Go to the User interface section and then click on Look and feel.

In the Date/Time formats configure the desired formats. Bear in mind these changes will affect both Jira and TM4J.

<table>
<thead>
<tr>
<th>Date/Time Formats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documentation on date/time formats can be found online.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time Format</th>
<th>h:mm a</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.g. 3:55 AM</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day Format</th>
<th>EEEE h:mm a</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.g. Wednesday 3:55 AM</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Complete Date/Time Format</th>
<th>dd/MMM/yyyy h:mm a</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.g. 23/May/07 3:55 AM</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day/Month/Year Format</th>
<th>dd/MMM/yyyy</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.g. 23/May/07</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Use ISO8601 standard in Date Picker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turning it on will cause Monday to be the first day of week in the Date Picker, as specified by the ISO8601 standard</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

Setting Thresholds to Improve Performance

If your TM4J instance has lots of data, admins can set thresholds (limits) for specific operations to avoid performance issues. Thresholds are available for both test-case and test-execution exports, plus you can limit the number of results generated by the Test Executions (Detailed) report.
1. Click **Test Management for Jira** in the settings menu to access TM4J's global admin options.

![Test Management for Jira](image)

2. While on the **Test Management for Jira** tab, click **Thresholds** from the options in the sidebar. Threshold options appear.

3. Enter the desired threshold for test cases, test executions, or results for the **Test Execution (Detailed)** report.

![Thresholds](image)

4. Click **Save**. The threshold limits are set.
   
   If someone on your team tries to export or generate data beyond the set threshold, the following error message appears:

![Error Message](image)
Jira Project Settings

Open a project in Jira to which you want to make project-settings changes.

Click the Project Settings gear icon on the bottom-left corner of the screen.

Then select Test Management for Jira.

Enabling and Disabling Test Management for JIRA

You can enable or disable Test Management by using this setting. Note: you can disable Test Management any time, without losing data.
Enabling/Disabling Test Management for Jira for specific issue types

You can enable/disable Test Management for Jira for the desired issue types.

### Issue Types

Enable/disable Test Management for Jira for the issue types listed below.

<table>
<thead>
<tr>
<th>Type</th>
<th>On</th>
<th>Off</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td><img src="on-off/1.png" alt="On" /></td>
<td><img src="on-off/0.png" alt="Off" /></td>
</tr>
<tr>
<td>Sub-task</td>
<td><img src="on-off/1.png" alt="On" /></td>
<td><img src="on-off/0.png" alt="Off" /></td>
</tr>
<tr>
<td>Story</td>
<td><img src="on-off/1.png" alt="On" /></td>
<td><img src="on-off/0.png" alt="Off" /></td>
</tr>
<tr>
<td>Bug</td>
<td><img src="on-off/1.png" alt="On" /></td>
<td><img src="on-off/0.png" alt="Off" /></td>
</tr>
<tr>
<td>Epic</td>
<td><img src="on-off/1.png" alt="On" /></td>
<td><img src="on-off/0.png" alt="Off" /></td>
</tr>
</tbody>
</table>

Hiding traceability sections in the Issue view page

Hide traceability sections from the issue view page when no links exist for test cases, test cycles or test plans.

### Traceability Sections

<table>
<thead>
<tr>
<th>Sections</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Case</td>
<td><img src="on-off/1.png" alt="on-off" /></td>
</tr>
<tr>
<td>Test Cycle</td>
<td><img src="on-off/1.png" alt="on-off" /></td>
</tr>
<tr>
<td>Test Plan</td>
<td><img src="on-off/1.png" alt="on-off" /></td>
</tr>
</tbody>
</table>

Enabling/Disabling automatic traceability links

Allows you to enable automatic traceability links between issues, test cases, test cycles and test plans.
### Permissions

If the permission system is enabled, the permissions configured in this setting will be handled on the selected project. Otherwise, all users that can view this project will be able to perform any actions on Test Management for Jira.

### Permissions

If the permission system is enabled, the permissions configured below will be handled on this project. Otherwise, all users that can view this project will be able to perform any actions on Test Management for Jira.

- **Permission system is disabled**

### Test Cases

<table>
<thead>
<tr>
<th>Permission</th>
<th>Users</th>
<th>Roles</th>
<th>Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td></td>
<td>🕵️‍♂️ Testers</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td></td>
<td>🕵️‍♂️ Testers</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
<td>🕵️‍♂️ Testers</td>
<td></td>
</tr>
<tr>
<td>Manage Folders</td>
<td></td>
<td>🕵️‍♂️ Testers</td>
<td></td>
</tr>
<tr>
<td>Create Versions</td>
<td></td>
<td>🕵️‍♂️ Testers</td>
<td></td>
</tr>
</tbody>
</table>

### Versions

Versions are points-in-time for a project. They help you schedule and organize your releases. TM4J uses the versions available in the Jira project settings page.
Components

Components are sub-sections of a project. They are used to group issues or test cases within a project into smaller parts. TM4J uses the components available in the Jira project settings page.
Test Management Settings

Open Test Management for Jira.

Click the ellipses (…).

The project configurations screen opens.

Configure project-level settings on this screen, including settings for environments, datasets, custom fields, statuses, and more.
The Environment page allows you to add new environments, and rename or remove existing ones. For each environment, you can define a name - displayed throughout the project - and a description.

<table>
<thead>
<tr>
<th>Environments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>Linux</td>
</tr>
<tr>
<td>MacOS</td>
</tr>
<tr>
<td>Windows</td>
</tr>
</tbody>
</table>

Labels

The Labels page allows you to add new labels, and rename or remove existing ones.
**Iterations**

The Iteration page allows you to add new iterations, and rename or remove existing ones. For each iteration, you can define a name - displayed throughout the project - and a description.
Datasets

The Datasets page allows you to define test data parameters that can be re-used in Test Cases across the Project on the Test Scripts.
Priorities

The Priorities page allows you to add new priorities, and rename or remove existing ones.

Test cases status

The Test Case Status page allows you to add new statuses that may be set to test cases. Here you can also rename or remove existing statuses.
Test plan status

The Test Plan Status page allows you to add new statuses that may be set to test plans. Here you can also rename or remove existing statuses.

Test cycle status

The Test Cycle Status page allows you to add new statuses that may be set to test cycles. Here you can also rename or remove existing statuses.
Test execution status

The Test Execution Status page allows you to add new statuses that may be set to test results. Here you can also rename or remove existing statuses.
Custom fields for test cases

The Custom Fields (Test Cases) page allows you to create custom fields of the following types: Checkbox, Date Picker, Decimal Number, Number, Select List, Text Field (Multi Line), Text Field (Single Line). You can also drag and drop to reorder the fields and define whether the fields are required or not. The custom fields are displayed under the section More Information of the Test Case.

Custom fields for test plans

The Custom Fields (Test Plans) page allows you to create custom fields of the following types: Checkbox, Date Picker, Decimal Number, Number, Select List, Text Field (Multi Line), Text Field (Single Line). You can also drag and drop to reorder the fields and define whether the fields are required or not. The custom fields are displayed under the section More Information of the Test Plan.
Custom fields for test cycles

The Custom Fields (Test Cycles) page allows you to create custom fields of the following types: Checkbox, Date Picker, Decimal Number, Number, Select List, Text Field (Multi Line), Text Field (Single Line), User Picker. You can also drag and drop to reorder the fields and define whether the fields are required or not. The custom fields are displayed under the section More Information of the Test Cycle.
Custom fields for test steps

The Custom Fields (Test Steps) page allows you to create custom fields of the following types: Checkbox, Date Picker, Decimal Number, Number, Select List, Text Field (Multi Line), Text Field (Single Line). You can also drag and drop to reorder the fields and define whether the fields are required or not.
Custom fields for test executions

The Custom Fields (Test Execution) page allows you to create custom fields of the following types: Checkbox, Date Picker, Decimal Number, Number, Select List, Text Field (Multi Line), Text Field (Single Line), User Picker. You can also drag and drop to reorder the fields and define whether the fields are required or not. The custom fields are displayed in the Test Player.
Custom fields for folders

The Custom Fields (Folders) page allows you to create custom fields. You can also drag and drop to reorder the fields. The custom fields are displayed in the edit Folder dialog.
• Start your free 30-day trial.

Have a question for us?

• Please submit a support request. We're happy to help!