Jira For T2S

External User Guide

Version 1.0

London Stock Exchange Group

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Manual

9 February 2015

1.0 Document Management

1.1 Document Identifier

[T2S-261]

1.2 Document History

Date	Version	Details
09 Feb 15	1.0	First Release

1.3 Glossary

Acronym	Description
MT	Monte Titoli
TMS	Trouble Management System (JIRA)

2.0 Introduction

The aim of this manual is to guide the external user with respect to the main functionalities of the tool which Monte Titoli has implemented as tms (trouble management system), for the Community and Business Day test phase during the T2S project.

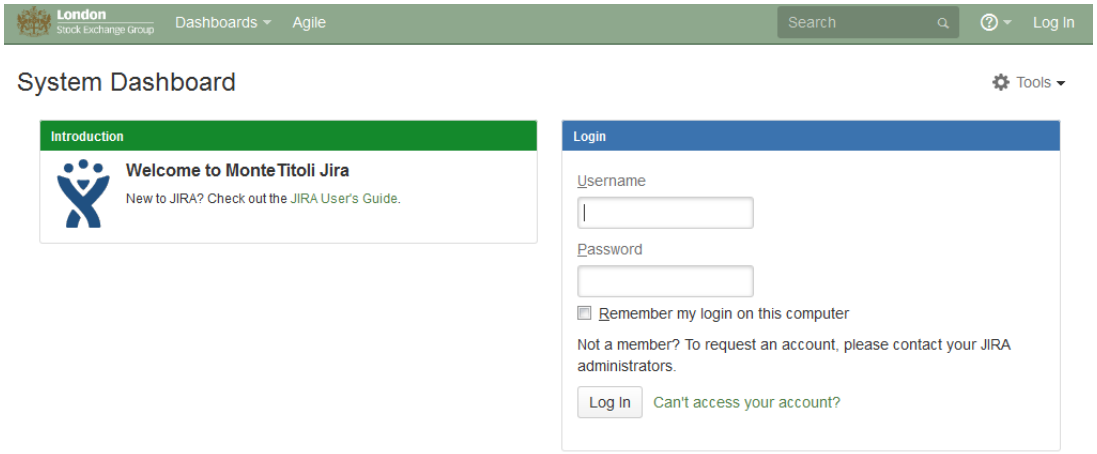
3.0 Getting Started

3.1 Connect

Monte Titoli's TMS can be reached trough the website:

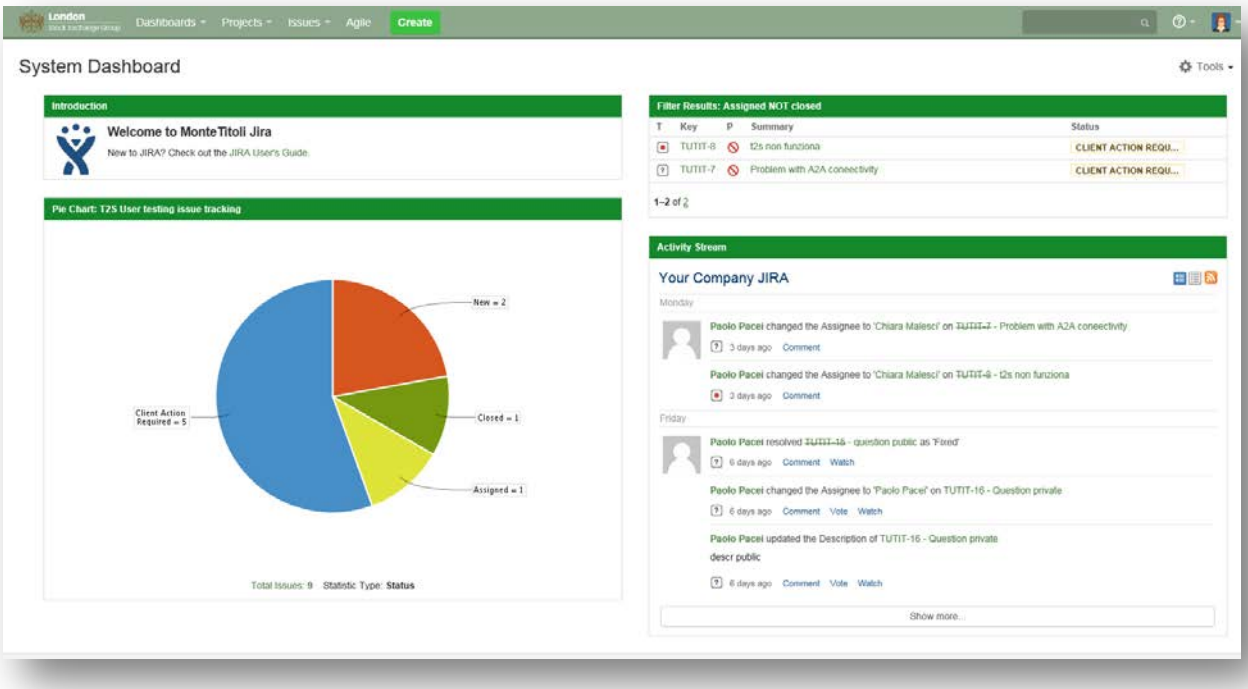
http://t2s-tms.montetitoli.it

The Login panel will be displayed as:



3.2 Log In

Enter your Username and Password and click the **Log In** button. The dashboard will be displayed.



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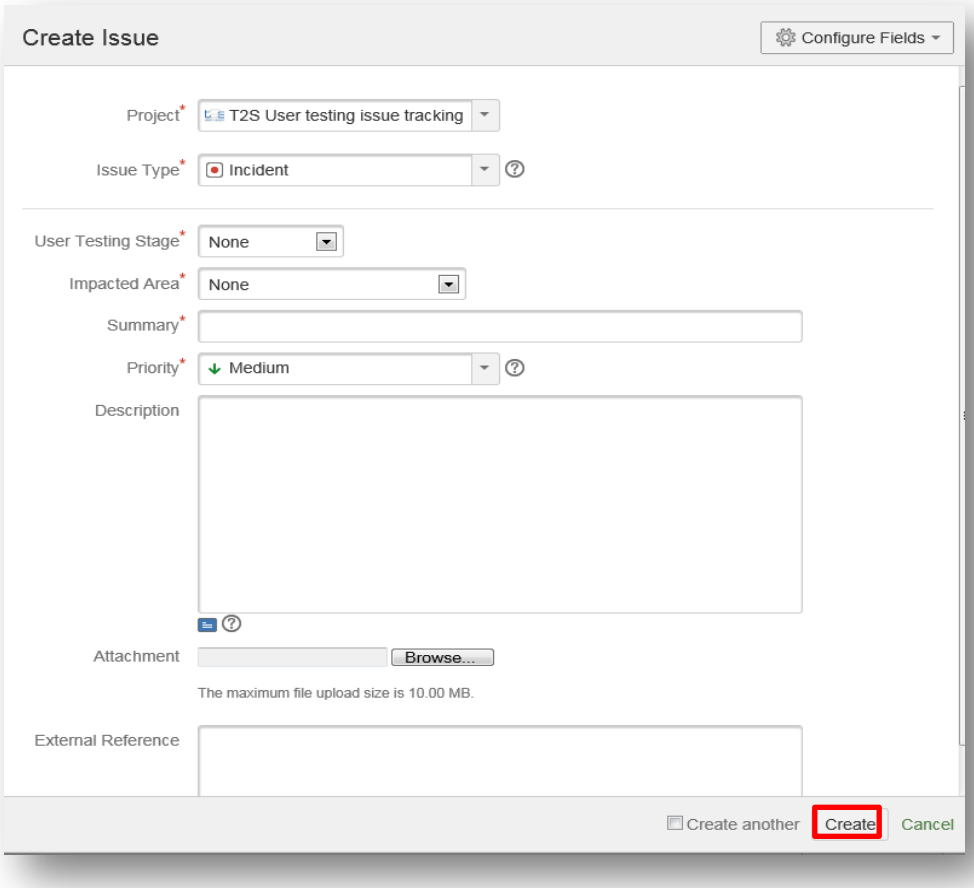
The **Dashboard** is the first page you see (by default) after logging in to JIRA.

- The navigation bar (at the top of the screen) is the same on every screen in JIRA. It contains links which give you quick access to many of JIRA's most useful functions.
- The System Dashboard screen itself, displays the gadgets which have been pre-selected for you.

4.0 Create an Issue

4.1 Via Web Interface

Click **Create** at the top of the screen to open the **Create Issue** dialog box.



Select the **Issue Type** on the **Create Issue** dialog box. Type a **Summary** for the issue and complete any appropriate fields — at least required ones which are marked by an asterisk.

Many fields have a drop-down list of choices from which to select the most appropriate:

- **Issue Type:**
  - **Incident** - A problem which impairs or prevents the functions of the product
  - **Question** - A doubt or an investigation request
- **User Testing Stages:**
  - **Community**
  - **Business Day**
- **Impacted Area:**
  - **T2S - GUI**
  - **T2S - System**
  - **MT - Connectivity**
  - **MT - Static Data Management**
  - **MT - Pre-settlement**
  - **MT - Settlement**
  - **MT - Reporting**
  - **MT - Custody Services**
  - **MT - Corporate Actions**
  - **MT - Position Management**
- **Priority:**
  - **Critical** – Complete unavailability of one or more services for which no workaround is available
  - **Urgent** – Major loss of function
  - **Medium** – Minor loss of function, or other problem where easy workaround is present
  - **Low** - Cosmetic problem

→MT will review the priority according to the defined severities

→ Please note that the field marked "**External Reference**" is reserved only for MonteTitoli's internal use

Once all the necessary fields are populated, select "**Create**" at the bottom to insert the new issue in to the TMS database

The user logged in during the issue creation, will be automatically registered as "**Reporter**" of the issue.

→ All issues are created “Private” (only Reporter and MT users can see them). Once the issue has been analysed by MT, it will become “Public”.

4.2 Via Email

It is possible to create an Incident via email, by sending an email to the address:

t2s-tms@lseg.com

- **Issue Creation:**
  - The subject of the email message will become the issue summary.
    ⚠ Since all issues require a summary, each email message intended for issue creation should include a subject.
  - The body of the email message will be the issue description and it must contain the concerned **Impacted Area**.
  - Only INCIDENTs can be created via email.
  - The sender email must be the same used for the user registration. The sender user will be registered as Reporter of the Incident.
  - Any attachments to the email message will become attachments to the issue.
    ℹ To ensure compatibility with various operating systems, any of the following characters in the filename will be replaced with an underscore character: \, /, ", %, :, $, ?, *, <, |, >.
  - The issue will be created with the default priority (Medium). If a different priority is desired, please specify it in the email body.
- **Comment Creation:**
  - If an email message contains an issue key (JIRA ID) in its subject line and that issue key exists in TMS, the program will add the email message content as a comment on the issue
  - Any attachments to the email will become attachments to the issue.

5.0 Issues Workflow

Both Incidents and Questions will follow a specific workflow, that will allow each user to know at all times the current status of each issue and to perform the necessary actions when needed.

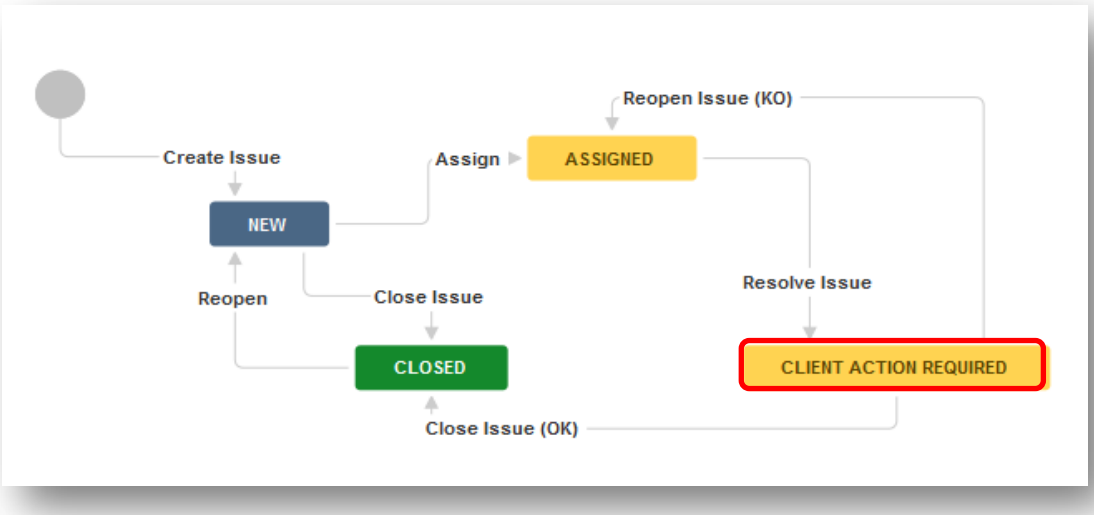
- **Statuses:**

  - **New** – Once an Issue is created, it can be closed or assigned. (External users can only close, whereas an MT user can close or assign the issue for work to commence on it.

  - **Assigned** – The issue is currently 'Work in Progress' at MT.

  - **Client Action Required** – MT has provided a solution/response and the Reporter can accept or refute such resolution. The same status can be used by MT to request for further details on the issue in order to proceed with the analysis, this specific usage is identified by the field "**Resolution**" populated with "Incomplete".

  - **Closed** – The issue was considered solved by the reporter and is now closed. A previously closed issue can be reopened by MT users.



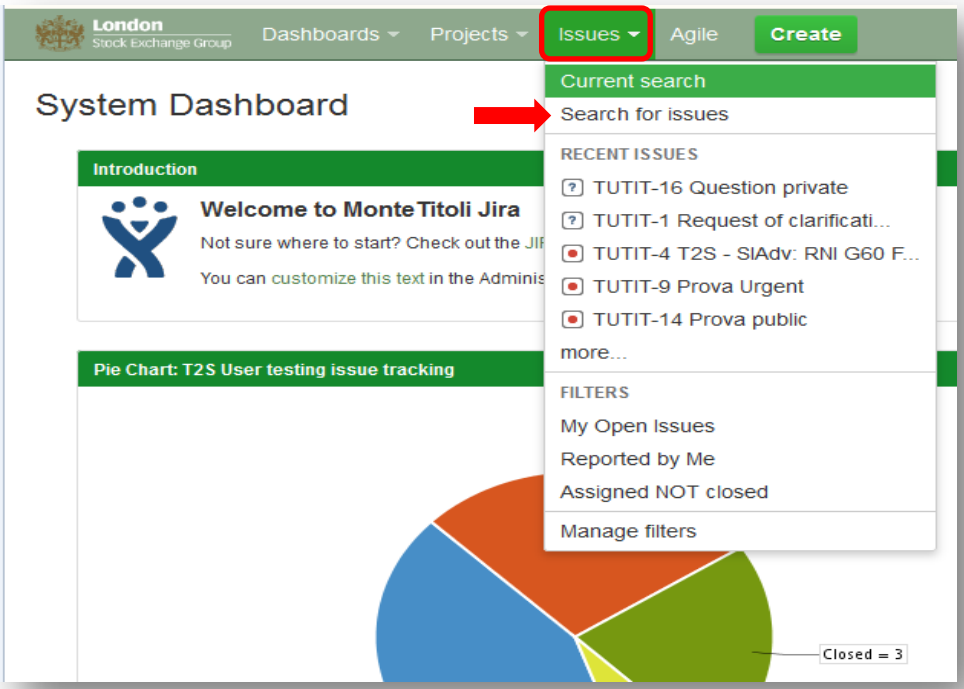
6.0 Managing the Issues

Each external user will have complete visibility on their own issues and on all "Public" ones.

6.1 Search

To search an issue (Incident or Question) there are many filters already available but is also possible to create (and save) custom ones.

On the bar at the top, select *Issues>Search for issues*

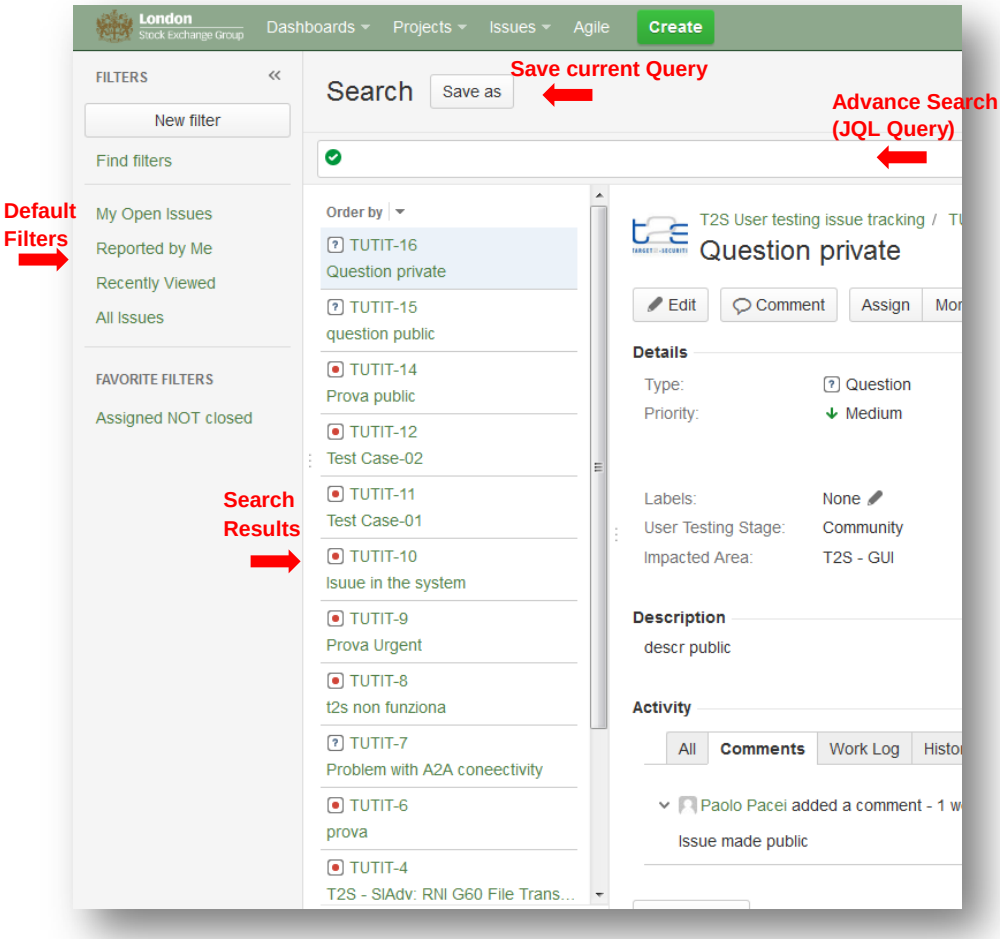


The search page is then displayed with the Basic Search bar:

- **Basic Search:** It is possible to apply the already prepared filters to search for issues in the TMS.
- **Default Filters:** Filters are already preselected in order to search the issues
- **Advance Search (JQL Query):** Is possible to create personal queries using JIRA Query Language such as: `status = open and priority = urgent and assignee = jsmith`

(for more information regarding JQL, see: *https://confluence.atlassian.com/display/JIRA063/Advanced+Searching*)

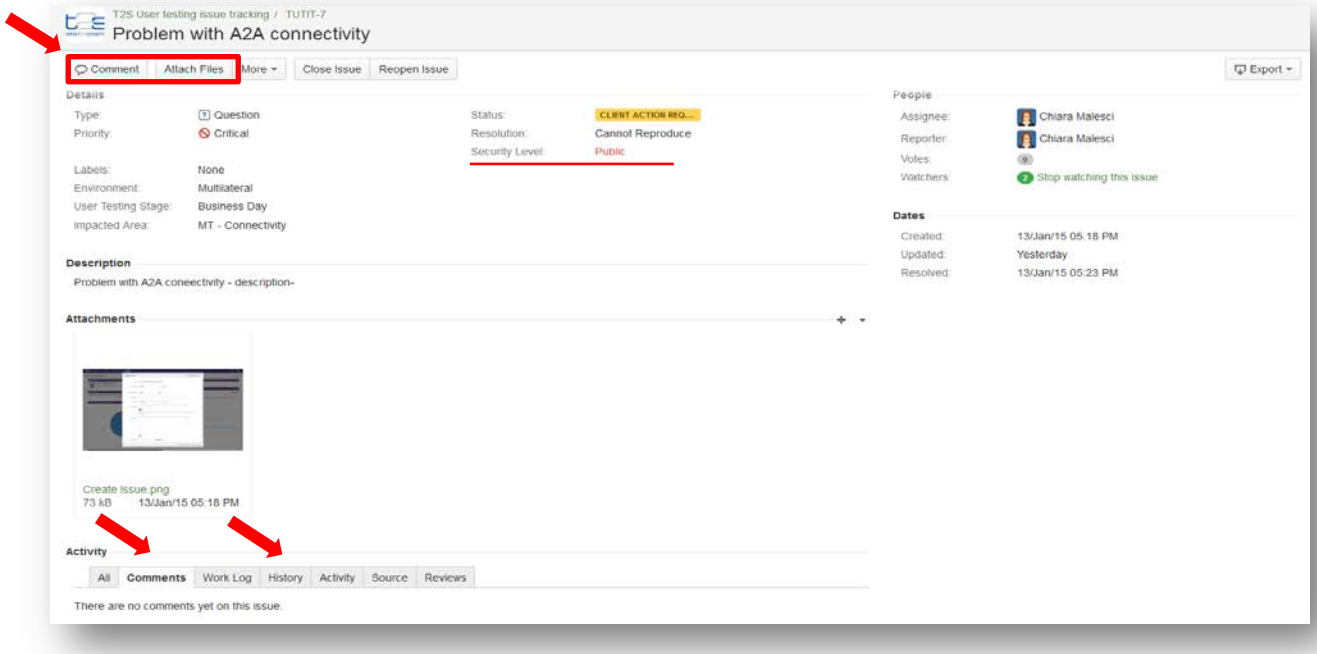
- **Save:** It is possible to save the current query by selecting “Save as”.



6.2 Navigate and Modify the Issue

By selecting one of the issues in the result list, is possible to open it and see all its details on the right side of the screen.

Insert comments and attachments



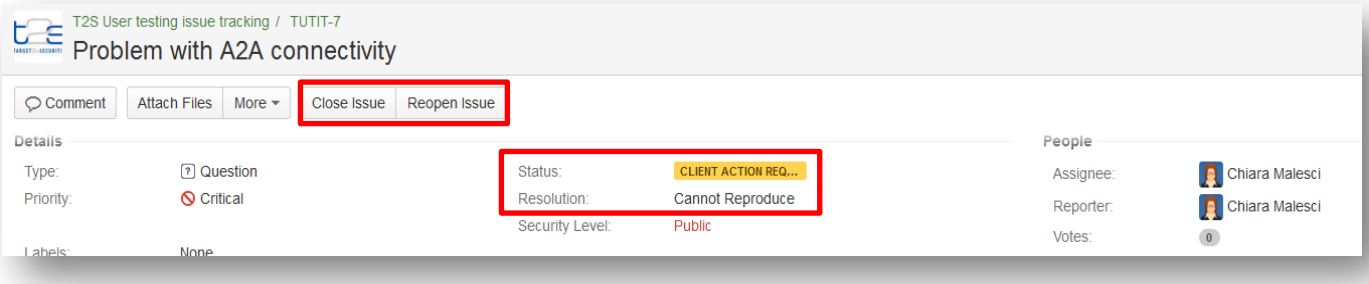
In this view it is possible to add comments and attachments to already existing Issues. It is also possible to see connected comments and history under the "**Activity"** section

→ In this screen the "**Security Level**" of the issue is also shown

6.3 Closing and Reopening an Issue

When an issue (incident or question) is in status "Client Action Required", and it's assigned to the Reporter, the client must decide if the "**Resolution**" given by Monte Titoli is accepted/validated and therefore close the issue, or refute Monte Titoli's response by reopening it.

If MT Resolution is a request for further details (**Resolution** = Incomplete), the client must Reopen the issue after providing the necessary details, so that MT will be able to finalize the issue analysis.



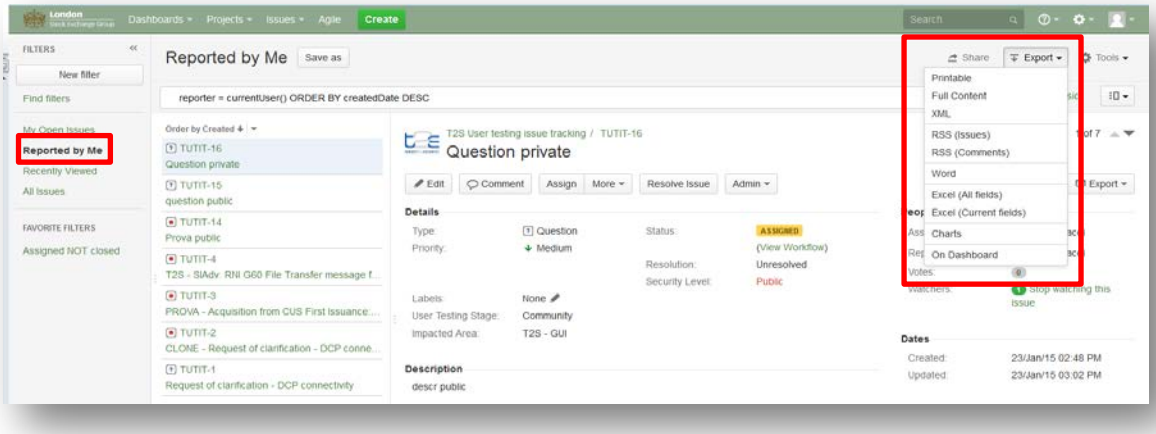
- **Close Issue:** If Monte Titoli's resolution is accepted, select "**Close Issue**" and the issue will go to status "Closed". Please add a comment if necessary.

- **Reopen Issue:** If Monte Titoli's resolution is not acceptable or the provided fix is not working as expected, select "**Reopen Issue**" to reassign the issue to Monte Titoli in order to have the matter reopened and re-assessed. The issue will go back to status "Assigned". Please add a comment to explain the resolution rejection.

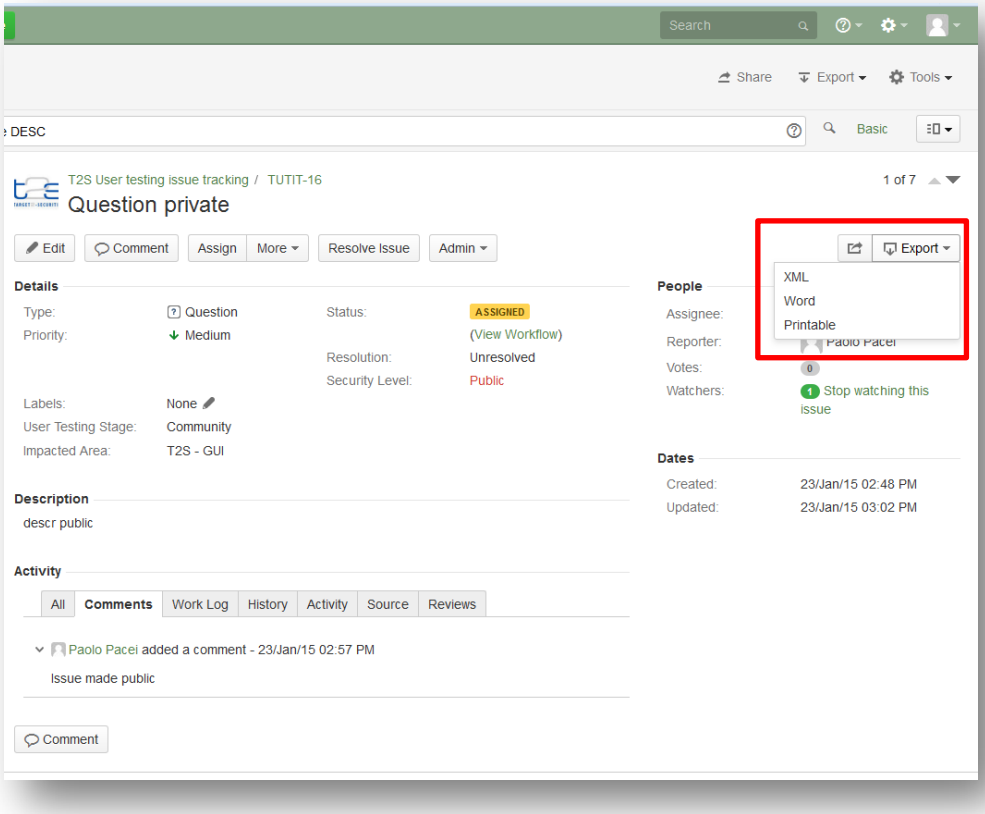
7.0 Exports and Email Notifications

7.1 Exports

After applying the necessary search filters, it will be possible to export the results in various formats by selecting the "**Export**" button on the top right corner.



It is also possible to export single issues by selecting the "**Export"** button inside the issue detailed view.



7.2 Email Notifications

An email notification will be received by "Current Assignee" and "Reporter " of the issue each time a modification/status change takes place. The email will be sent to the email registered for the user involved.

→ All the registered clients will receive an email in case of Public issue resolution.

8.0 Miscellaneous

8.1 Change Password

To change the password click on the avatar on the top right corner and select profile, than select “Change Password “ and follow he procedure. The new password will be applied immediately.

8.2 More Info

For more information, please go to the Atlassian online guide:

https://confluence.atlassian.com/display/JIRA063/JIRA+User%27s+Guide

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