# Jira For T2S

## **External User Guide**

Version 1.0



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#### **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:

Stock Exchange Group Dashboards - Agile	Search Q 🕐 🗸 Log In
System Dashboard	🌣 Tools 🕶
Introduction	Login
Welcome to Monte Titoli Jira New to JIRA? Check out the JIRA User's Guide.	Username

#### 3.2 Log In

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

em Dashboard		¢ 1
ntroduction	Filter Results: Assigned NOT closed	
. Welcome to MonteTitoli Jira	T Key P Summary	Status
New to JIRA? Check out the JIRA Liser's Guide.	<ul> <li>TUTIT-8 S 12s non funziona</li> </ul>	CLIENT ACTION REQU
<b>N</b>	TUTIT-7 S Problem with A2A consectivity	CLIENT ACTION REQU
Pie Chart: T2S User testing issue tracking	1-2 of 2	
	Activity Stream	
	Your Company JIRA	
New = 2	Monday	
	Paolo Pacei changed the Assignee to 'Chiara Malesci' on TUT 3 days app Comment	II-I - Problem with A2A consectivity
	Paolo Pacei changed the Assignee to 'Chiara Malesci' on TUT	17-é - t2s non funziona
Client Action Closed =	Friday	
ktdmice = 2	Paolo Pacet resolved TUTT-15 - gaestion public as Fitred	
	G days ago Comment Watch	
Assigned	Paolo Pacei changed the Assignee to 'Paolo Pacei' on TUTIT	16 - Guestion private
	6 days ago Comment Vote Watch	
	Paolo Pacel updated the Description of TUTIT-16 - Question s	rrvate
	descr public	
Total Issues: 9 Statistic Type: Status	(7) 6 days ago Comment Vote Watch	

5

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.

Create Issue	1	S Configure Fields -
Project*	T2S User testing issue tracking	
Issue Type <sup>*</sup>	Incident     T	
User Testing Stage*	None	
Impacted Area*	None	
Summary*		
Priority*	✓ Medium ✓ ⑦	
Description		
Attachment	Browse	
	The maximum file upload size is 10.00 MB.	
External Reference		- I
	Create anoth	er Create Cancel
_		

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:

- o Incident A problem which impairs or prevents the functions of the product
- o Question A doubt or an investigation request

#### User Testing Stages:

- Community
- Business Ďay

#### Impacted Area:

- o **T2S GUI**
- o **T2S System**
- MT Connectivity
- MT Static Data Management
- MT Pre-settlement
- o MT Settlement
- o MT Reporting
- MT Custody Services
- MT Corporate Actions
- MT Position Management
- > <u>Priority:</u>
  - Critical Complete unavailability of one or more services for which no workaround is available
  - **Urgent** Major loss of function
  - o Medium Minor loss of function, or other problem where easy workaround is present
  - Low Cosmetic problem

 $\rightarrow$ 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 <u>it must contain the</u> <u>concerned **Impacted Area**</u>.
- o Only INCIDENTs can be created via email.
- <u>The sender email must be the same used for the user registration</u>. The sender user will be registered as Reporter of the Incident.
- Any attachments to the email message will become attachments to the issue.
   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.

#### > <u>Comment Creation:</u>

- If an email message contains an <u>issue key</u> (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
- o 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".

	FILTERS «	Search Save as	rrer	nt Query	
	New filter				(JQL Query)
	Find filters	0			
fault	My Open Issues	Order by 💌	-	T2S User test	ing issue tracking / T
ters	Reported by Me	<ul> <li>TUTIT-16</li> <li>Question private</li> </ul>	L	Question	n private
	All Issues	TUTIT-15     question public	L	Sedit Comm	Assign Mor
	FAVORITE FILTERS	TUTIT-14 Prova public	L	Details Type:	? Question
,	Assigned NOT closed	TUTIT-12     Test Case-02	=	Priority:	✓ Medium
	Search Results	TUTIT-11 Test Case-01		Labels: User Testing Stage:	None /
		TUTIT-10     Isuue in the system	ľ	Impacted Area:	T2S - GUI
		TUTIT-9 Prova Urgent	L	Description descr public	
		TUTIT-8     t2s non funziona	L	Activity	
		(?) TUTIT-7 Problem with A2A coneectivity		All Comments	Work Log Histo
		TUTIT-6 prova		Paolo Pacei a Issue made publi	dded a comment - 1 w c
		TUTIT-4 T28 SIAdy: DNI C60 File Traps			•

#### 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.

Status: Resolution: Security Level	CLINIT ACTION REQ., Cannot Reproduce Public	People Assignee: Reporter Votes:	Chiara Malesci
Status: Resolution: Security Level	CLIENT ACTION RED Cannot Reproduce Public	Assignee: Reporter Votes:	Chiara Malesci
Resolution: Security Level	Cannot Reproduce Public	Reporter Votes:	Chiara Malesci
Security Level	Public	Voles:	
			1000
		Watchers	Stop watching this issue
		Dates	
		Created:	13/Jan/15 05 18 PM
		Updated:	Yesterday
		* •	
			Created: Updated: Resolved:

In this view it is possible to <u>add comments and attachments</u> 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.

T2S Use	r testing issue tracking / TUTIT-7 Iem with A2A connectivity	/			
Comment	Attach Files More - Close Issue	Reopen Issue		People	
Туре:	(?) Question	Status:	CLIENT ACTION REQ	Assignee	: 👩 Chiara Malesci
Priority:	S Critical	Resolution:	Cannot Reproduce	Reporter	Chiara Malesci
		Security Level:	Public	Votoo	

- 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.
- <u>Reopen Issue:</u> 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.

ILTERS «	Reported by Me Save as							🖽 Share 🗇 Export -			🎝 Tools 🕶
New filter								Printable			
ind filters	reporter = currentUser() ORDER BY createdDa	e DESC						1	Full Content	sic ID -	sic ID -
ty Open Issues	Order by Created 4 -	T2S User testing issue tracking / TUTIT-16			XML DSS (Insues)			1017			
teported by Me	Question private						RSS (Commen	ts)			
lecently Viewed	(F) TUTIT-15	/ Edit	O Comment	t Assign	More -	Resolve Issue	Admin -		Word		Export -
All Issues	question public	Petalle						Excel (All fields)			
	TUTIT-14 Prova public	Type		Question		Status	ASSIGNED	Ass	Charts	neics)	все
	TUTIT-4     T2S - SIAdv. RNI G60 File Transfer message f	Priority.	Priority: 4 Medium	Resolution:	Unresolved	Rej	On Dashboard		300		
	TUTIT-3     PROVA - Acquisition from CUS First Issuance	Labels	tinn Stane	None 🖋		Security Level	Public	944	chers.	stop wat issue	ching this
	TUTIT-2     CLONE - Request of clarification - DCP conne	Impacted	Area:	T2S - GUI				Date	\$		
	TUTIT-1 Request of clarification - DCP connectivity	Description	blic					Up	ated Jaled	23/Jan/15 02 23/Jan/15 03	2:48 PM 3:02 PM

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

				<u></u> 2 50	
SC					⑦ ♀ Basic Ⅱ ▼
Questic	sting issue tracking / TU on private	JTIT-16			1 of 7 🔺 💌
✓ Edit	Mor	e • Resolve Issue	Admin 👻	People	I Export -
Type: Priority:	<ul><li>? Question</li><li>↓ Medium</li></ul>	Status: Resolution: Security Level:	ASSIGNED (View Workflow) Unresolved Public	Assignee: Reporter: Votes:	Word Printable Paolo Pacer
Labels: User Testing Stage: Impacted Area:	None 🖋 Community T2S - GUI			Dates	stop watching this issue
escription				Updated:	23/Jan/15 02:48 PM 23/Jan/15 03:02 PM
All Commen	ts Work Log Histor	y Activity Source R Jan/15 02:57 PM	teviews		

#### 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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