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Document release by Linedata Services.
TABLE OF CONTENTS

1  INTRODUCTION ........................................................................................................4
  1.1 PURPOSE ..............................................................................................................4
  1.2 AUDIENCE ...........................................................................................................4
  1.3 ACCES .................................................................................................................4
  1.4 ACCOUNTS...........................................................................................................4

2  INTERFACE ................................................................................................................5
  2.1 MYLINEDATA LOGIN PAGE .................................................................................5
  2.2 MAIN SCREEN ......................................................................................................7
    2.2.1 Left-hand menu ..............................................................................................7
    2.2.2 Right-hand menu ..........................................................................................11

3  POSSIBLE ACTIONS ON ISSUES .............................................................................14
  3.1 COMMENT .............................................................................................................14
  3.2 ATTACHMENT ....................................................................................................14
  3.3 LINK .....................................................................................................................14
  3.4 CLONE ................................................................................................................14
  3.5 EXPORT ..............................................................................................................14

4  DIFFERENTS STATUSES of an issue ......................................................................15

5  DOCUMENT HISTORY ...........................................................................................16
1 INTRODUCTION

1.1 PURPOSE

The purpose of this manual is to present JIRA features to the users and help them submit a defect report or feature request to the Hotline.

JIRA is an issue tracking application that gives our customers access to various features. This tool should provide them with useful information in real time and allow them to report or request something more easily.

1.2 AUDIENCE

This manual is intended to external users working on LINEDATA projects.

1.3 ACCES

In order to access the application, start your Web browser and navigate to: https://my.linedata.com

1.4 ACCOUNTS

The user accounts are mentioned with their e-mail addresses and limited to 5 per client.
2 INTERFACE

2.1 MYLINEDATA LOGIN PAGE

Via the address [https://my.linedata.com](https://my.linedata.com), you gain access to MyLinedata’s login screen:

**ATTENTION** - Please note that you must not change the password: MyLinedata’s and JIRA’s username and password must be the same. If you change your password in one of the tools and not in the other, login will fail.

After login, the MyLinedata welcome page is displayed:
To access JIRA, you can choose the product related to the issue in the “My solutions” tab. You can choose between:

- Linedata CapitalStream
- Linedata Ekip
- Linedata Profinance
- Linedata Uniloan

Once you have chosen your product, the JIRA welcome page is displayed:

The JIRA client documentation is available via the link attached to the Dashboard in the “Introduction” part.

Logout is made via icon in the small block in the top-right corner.
2.2 MAIN SCREEN

JIRA's main screen is broken down into three parts:

A **left-hand menu** for submitting or monitoring issues:

A **right-hand menu** for managing profiles:

### 2.2.1 Left-hand menu

This menu allows you to:

**a) Manage dashboards.**

This feature allows you to view and configure dashboard pages.

Clicking on Dashboard will display the dashboard defined as main in the Manage Dashboards settings.

Clicking on Manage Dashboards allows you to manage your favourite (Favourites), created (My) and shared (Popular) dashboards, as well as search for existing ones (Search).

It also allows you to Restore Defaults to return to the default system and Create (a) new Dashboard to configure your home page.

*To create a new dashboard, please refer to the online JIRA documentation.*

**b) Display different projects.**

This feature specifies on which project you are currently working and displays the list of projects available to you.

Clicking on the project name under Current Project gives you access to information on this project.

This page is broken down into four sections:

➢ A **Summary** section which gives a description of the project, a 30-day summary and the activity history.
➢ An **Issues** section which presents a percentage of issues by priority, assignee, version, status, or component. You can also search issues by category:
   • All,
   • Unresolved,
   • Added Recently,
   • Resolved Recently,
   • Updated Recently,
   • Assigned to Me,
   • Reported by Me,
   • Unscheduled,
   • Unresolved.

➢ A **Reports** section allows you to create graphs, charts or documents on particular information relating to project issues.

➢ A **Components** section presents the different LINEDATA products.

A **View All Projects** section lists all the projects that are available to you.

*For more information about these sections, please refer to the online JIRA documentation.*

c) **Monitor Issues.**

This feature allows you to search for information and apply filters to the project issues.

The **Query** section allows you to filter issues by project, issue type, status or assignment. Information can be displayed:

   • In Detail view, to display a list of issues on the left-hand side with their details on the right-hand side.
   • In Issue View, to display the full list of issues.

The **Filters** section allows you to manage your favourite (Favourites), created (My) and shared (Popular) filters, as well as search for existing ones (Search).

After a query, it is possible to export the search results via the "Export" button located in the top-right corner of the screen. In the "Tools" menu which is also located in the top-right corner you can make batch changes to carry out the same action on all of the query's reports.

*To create a filter, please refer to the online JIRA documentation.*
d) Create an issue.

This feature allows you to create client issues related to LINEDATA projects.

To create an issue, please fill in the following information and click on Create:

<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project</strong></td>
<td>Mandatory field for creation. List of projects for which an issue can be created.</td>
</tr>
<tr>
<td><strong>Type of issue</strong></td>
<td>Mandatory field for creation. List of issue types to which an issue can be assigned. The possible values are:</td>
</tr>
<tr>
<td></td>
<td>• &quot;Client-Project&quot; for defect reports relating to a project with Linedata,</td>
</tr>
<tr>
<td></td>
<td>• &quot;Production-Support&quot; for defect reports relating to incidents occurring during production,</td>
</tr>
<tr>
<td></td>
<td>• &quot;Improvement-Support&quot; for defect reports relating to improvements currently being tested by the client.</td>
</tr>
<tr>
<td></td>
<td>The &quot;Client-Project&quot; type is enabled for clients during the project stage only. The &quot;Production-Support&quot; and &quot;Improvement-Support&quot; types are enabled for clients during the support stage. The three types are enabled for clients in the two stages.</td>
</tr>
<tr>
<td><strong>Client ref.</strong></td>
<td>Mandatory field for creation. Client issue monitoring tool reference or any reference used by the client to identify his issue.</td>
</tr>
<tr>
<td><strong>Client Priority</strong></td>
<td>Mandatory field for creation. Issue priority set by the Client. This value is set to &quot;Minor&quot; by default. The possible values are:</td>
</tr>
<tr>
<td></td>
<td>• Stopped</td>
</tr>
<tr>
<td></td>
<td>• Critical</td>
</tr>
<tr>
<td></td>
<td>• Important</td>
</tr>
<tr>
<td></td>
<td>• Minor</td>
</tr>
<tr>
<td></td>
<td>• Uncomplicated.</td>
</tr>
<tr>
<td><strong>Client’s designated contact</strong></td>
<td>This field lets the user indicate the name of the person who monitors the issue. It is not linked to the user accounts, any name can be input.</td>
</tr>
<tr>
<td><strong>Client Classification</strong></td>
<td>Mandatory field for creation. This list lets the user define the type of issue. By default, the value is set to &quot;Unknown&quot;. The possible values are:</td>
</tr>
<tr>
<td></td>
<td>• Defect,</td>
</tr>
<tr>
<td></td>
<td>• Support,</td>
</tr>
<tr>
<td></td>
<td>• Configuration,</td>
</tr>
<tr>
<td></td>
<td>• Improvement</td>
</tr>
<tr>
<td></td>
<td>• Install./Delivery</td>
</tr>
<tr>
<td></td>
<td>• Off-contract intervention.</td>
</tr>
</tbody>
</table>
| **Summary**          | Mandatory field for creation.  
|                     | Meaningful and relevant title related to the issue. |
| **Environment**     | Mandatory field for creation.  
|                     | Free-input text type to describe the equipment or software environment to which the issue refers. |
| **Line of business**| Liste à choix unique, correspondant au domaine d’intégration défini par le responsable de l’intégration du projet. Par défaut, la valeur est à « Aucune » et les choix possibles sont :  
|                     | • Others  
|                     | • EKP-Archiving  
|                     | • EKP-Accounting  
|                     | • EKP-Contract modification requests  
|                     | • EKP-Ergonomics  
|                     | • EKP-FRONT-Miscellaneous  
|                     | • EKP-FRONT-EKIP-BACK Injection  
|                     | • EKP-FRONT-Offers  
|                     | • EKP-FRONT-Configuration  
|                     | • EKP-FRONT-Process  
|                     | • EKP-FRONT-Services  
|                     | • EKP-FRONT-Third parties  
|                     | • EKP-Workflow - WF  
|                     | • EKP-Contract creation/Enforcement  
|                     | • EKP-Performances  
|                     | • EKP-Purge  
|                     | • EKP-Payments  
|                     | • PRF-Admin  
|                     | • PRF-Archiving  
|                     | • PRF-Autoself  
|                     | • PRF-B.O.S  
|                     | • PRF-Batches  
|                     | • PRF-FAMOS UK  
|                     | • PRF-FARM  
|                     | • PRF-Front Financing  
|                     | • PRF-Front Revolving  
|                     | • PRF-Front Wholesale  
|                     | • PRF-HUB  
|                     | • PRF-Interface  
|                     | • PRF-Migration  
|                     | • PRF-Performance  
|                     | • PRF-Portail  
|                     | • PRF-Reports  
|                     | • PRF-Score  
|                     | • PRF-Sofia  
| **Description**     | Main text field to describe the issue to be processed in detail.  

The functional domains starting with EKP refer to the EKIP product and those preceded by PRF refer to the PROFINANCE product.
Component | Mandatory field for creation.  
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple-choice list which lets the user indicate the product linked to the issue.</td>
</tr>
</tbody>
</table>

Affects Version/s | Mandatory field for creation.  
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple-choice list which lets the user indicate the release(s) version(s) in which the problem occurs.</td>
</tr>
</tbody>
</table>

Attachments | This field makes it possible to attach files.  

You can configure the way fields are displayed upon data input by clicking on the top-right button Configure fields.

You can also click on the check box next to the Create button at the bottom of the page to automatically create a new issue.

2.2.2 Right-hand menu

This menu allows you to:
- search for project information,
- access the Help and Other information features,
- manage user profiles.

a) Quick search

This feature enables you to perform a quick search for specific information contained in various projects or issues.

b) Help

This feature gives access to the product's online help and to different information related to the system.

c) User

This feature allows you to manage your profile, user preferences and to log in and out of the Atlassian marketplace.
**Profile**

The first window is the **Summary** window:

**Details**

- **Avatar:** [Image]
- **Username:** admin
- **Administration:** [Redacted]
- **Full Name:** [Redacted]
- **Email:** [Redacted]
- **Remember My Login:** Clear All Tokens
- **Groups:**
  - jira-administrators
  - jira-developers
  - jira-users
- **Project Roles:** View Project Roles

Which lets users view or edit their personal information.

The following modifications are possible in this window (via the pencil - red circle icon on the image):
- avatars: click on the icon to choose a new one or upload another image.
- click on the pencil icon to change your username or e-mail. You will be asked to re-enter your password to validate the changes.
- click on **Change Password** to modify your password.
- stored information: click on **Clear All Tokens** to delete all dashboards, filters, etc.

The second window is the **Preferences** window:

**Preferences**

- **Page Size:** 50
- **Email Type:** HTML
- **Language:** English (UK)
- **Time Zone:** JIRA default (GMT +01:00) Paris
- **My Changes:** Do not notify me
- **Filter and Dashboard:** Unshared
- **Sharing:**
- **Keyboard shortcuts:** Enabled
- **Autowatch:** Inherit from global settings

Which lets users view or edit their preferences.

The following modifications are possible in this window (via the pencil - red circle icon on the image):
- The page size (number of issues displayed by page in the Issue Navigator)
- The e-mail type (text or HTML format)
- The language (this only impacts the user profile)
- The time zone
- My changes, i.e. whether to e-mail notifications of any changes you make
- Sharing, i.e. whether to share the filters and dashboards you create
- Keyboard shortcuts, i.e. whether to enable or disable keyboard shortcuts.
- Autowatch, i.e. whether issues that you create or comment on will automatically be watched for future changes.
The third window is the **Assign Open Issues per Project** window, which displays the list of issues per project for which you are the Assignee.

**Demandes ouvertes attribuées par projet**

Aucune demande ouverte ne vous est attribuée.

The fourth window is the **Activity Stream** window, which displays the user history.

**Atlassian Marketplace**
The Atlassian marketplace allows you to browse different add-ons available to enhance Atlassian products. Different search criteria can be used to help you easily find the add-on that you need.

*Please note that this feature is not available for external users.*

**My JIRA Home Page**
This feature allows you to configure the **Dashboard** or the **Issue Navigator** as your JIRA home page (i.e. the page you are presented with after you log in).
3 POSSIBLE ACTIONS ON ISSUES

3.1 COMMENT
You can leave a comment on an issue by clicking on the Comment button at the top or bottom of the issue page.

3.2 ATTACHMENT
You can attach a file to an issue by clicking on the Attach Files button at the top of the issue page.

3.3 LINK
You can link an issue to another issue that's been submitted in the application or using an external URL.
   To do so, click on More Actions, then Link and choose a type of link.

3.4 CLONE
Cloning or copying an issue lets you quickly create a duplicate of an issue within the same project.
   To do so, click on More Actions, then Clone and give a new title to the issue.

3.5 EXPORT
Click on the Export button to export the issue to a Microsoft Word, XML or printable format.

   This can be performed on issues set to status OPEN, IN PROGRESS, AWAITING RESPONSE, RESOLVED, DELIVERED AND CLOSED.

   For more information on these actions, please refer to the online JIRA documentation.
### 4 DIFFERENTS STATUSES OF AN ISSUE

Below is an overview of the different statuses that can be given to an issue:

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPEN</td>
<td>The issue has been logged but still has to be assigned to a member of staff. The issue can now be set to <strong>IN PROGRESS</strong> by LINEDATA or be <strong>CANCELLED</strong> by the Client. A &quot;Cancel Issue&quot; button allows the Client to cancel an issue.</td>
</tr>
<tr>
<td>IN PROGRESS</td>
<td>The issue has been assigned to a member of the support staff and is being dealt with by LINEDATA.</td>
</tr>
<tr>
<td>AWAITING RESPONSE</td>
<td>LINEDATA is waiting for the client to reply and give more information about the issue.</td>
</tr>
<tr>
<td></td>
<td>This means that work on the issue has been stopped until further notice.</td>
</tr>
<tr>
<td></td>
<td>A &quot;Complete the issue&quot; button allows the Client to send a reply.</td>
</tr>
<tr>
<td></td>
<td>Once the reply has been sent, the status will be set to <strong>REPLIED</strong>.</td>
</tr>
<tr>
<td>REPLIED</td>
<td>LINEDATA has received feedback from the Client.</td>
</tr>
<tr>
<td></td>
<td>Once the reply has been handled by LINEDATA, the status will be set to <strong>IN PROGRESS</strong>.</td>
</tr>
<tr>
<td>RESOLVED</td>
<td>The LINEDATA support team has finished its work and has sent a written explanation to the Client, to which a corrective patch can be attached.</td>
</tr>
<tr>
<td></td>
<td>The issue's status is set to <strong>RESOLVED</strong>.</td>
</tr>
<tr>
<td>DELIVERED</td>
<td>The LINEDATA support team delivered the corrective patch to the Client, specifying the version of the product delivered and setting the issue's status to <strong>DELIVERED</strong></td>
</tr>
<tr>
<td>CLOSED</td>
<td>The client is satisfied with the reply and has confirmed it. The issue can only be closed after its status has been set to <strong>DELIVERED</strong>.</td>
</tr>
<tr>
<td></td>
<td>Click on the &quot;Close Issue&quot; button to do so.</td>
</tr>
<tr>
<td>CANCELED</td>
<td>The Client can cancel an issue by using the &quot;Cancel issue&quot; button when its status is <strong>OPEN</strong>.</td>
</tr>
<tr>
<td></td>
<td>The Client cannot cancel an issue whose status is not <strong>OPEN</strong>, s/he must leave a comment to request cancellation of the issue.</td>
</tr>
<tr>
<td></td>
<td>The issue will be cancelled by LINEDATA and its status set to <strong>CANCELLED</strong>.</td>
</tr>
</tbody>
</table>
5 DOCUMENT HISTORY

File Informations

<table>
<thead>
<tr>
<th>Number of pages/size</th>
<th>16</th>
</tr>
</thead>
<tbody>
<tr>
<td>File name</td>
<td>Users_Documentation_JIRA.docx</td>
</tr>
</tbody>
</table>

Document version history

<table>
<thead>
<tr>
<th>Number</th>
<th>Date</th>
<th>By</th>
<th>Modifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>20/06/2014</td>
<td>S. BASTIEN</td>
<td>Document creation</td>
</tr>
<tr>
<td>2</td>
<td>08/07/2014</td>
<td>S. BASTIEN</td>
<td>Document history.</td>
</tr>
<tr>
<td>3</td>
<td>08/07/2014</td>
<td>Y. MERIEL</td>
<td>Document history.</td>
</tr>
<tr>
<td>4</td>
<td>17/07/2014</td>
<td>C. BAILLY</td>
<td>Document history.</td>
</tr>
<tr>
<td>5</td>
<td>07/12/2016</td>
<td>S. BASTIEN</td>
<td>Document history.</td>
</tr>
<tr>
<td>6</td>
<td>18/06/2018</td>
<td>S. BASTIEN</td>
<td>Setted up the new charter.</td>
</tr>
</tbody>
</table>