EBA IT Service Desk

Project & Business Application Folders – Creation and Access Rights

User Guide

Contents

Abbreviations

EBA	European Banking Authority
eDEN	Electronic Document Management System
DMO	Document Management Officer

Revision history

Version history	Date	Author	Comments
0.1	23 September 2016	EBA IT	First draft
0.2	03 October 2016	EBA IT	Second draft
0.3	04 October 2016	EBA IT	Third draft
0.4	05 October 2016	EBA IT	Fourth draft
0.5	06 October 2016	EBA IT	Final

1. Introduction

A new file shares landscape has been proposed by EBA Business Users in order to support EBA Staff when using EBA Document Management tool (eDEN), facilitate the adoption of EBA's Document Management Policies and ensure clearer ownership and accountability.

The new File Shares landscape includes the creation of new processes in EBA's existing application called JIRA Service Desk.

The two implemented processes enable EBA users to request creation of and give access to

- 'PROJECT' folders
- 'BUSINESS APPLICATION' folders

The necessary approval steps are facilitated as well.

1.1 Audience

This document is intended for all EBA staff.

2. Scope definition

The functionalities supported and described in this document include:

1. **Request for the creation of a Business Application Folder.**

   The request is initiated by the user and approved in the following order:

   1) the *Owner*,

   2) the EBA *DMO* and

   3) the EBA *Head of IT*

2. **Request for the creation of a Project Folder.**

   The request is initiated by the user and approved in the following order:

   1) the *Owner*,

   2) the EBA *DMO* and

   3) the EBA *Head of IT*.

3. Request for access in any of the above Folders.

The request is initiated by the user and approved by the *Owner*.

2.1 Users and roles

2.1.1 Users

Any person with permission to access the system is a user.

2.1.2 Roles and permissions

Depending on the role, each user will be able to perform certain tasks in the system.

The main roles in the system are specified below:

User	Short description
Public User	This is a basic role for every user, giving access to request folder creation and folder access.
Owner	The person who is responsible for: ▪ Approving access requests to the folders he is the *Owner*. ▪ First approval for the creation of Project and Application Folders. At present the *Owner* role has been given to EBA Line Managers as detailed in Annex 1.
DMO	The person who is responsible for ▪ Second approval for the creation of Project and Application Folders.
Head of IT	The person who is responsible for ▪ Third and final approval for the creation of Project and Application Folders.

Please note: *DMO* and *Head of IT* Roles can be given to **only one individual** at the time. In case of unavailability, IT Support needs to be informed about the possible delegation of roles.
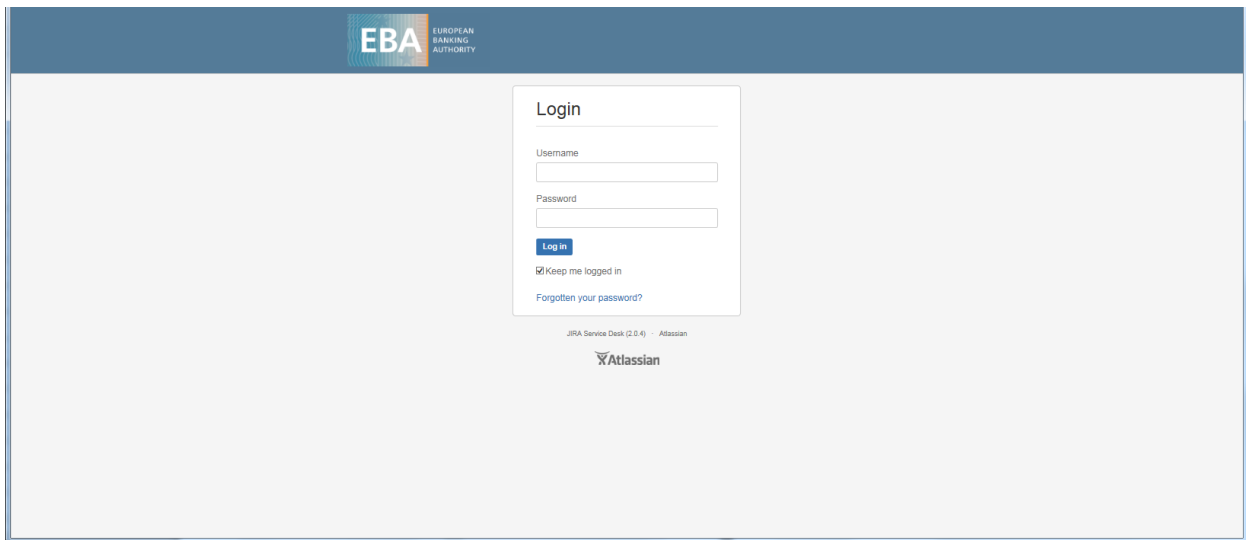
3. Logging in IT Service Desk

This section describes the login process to IT Service Desk in order to request the creation or access to an existing Project or Application Folder.
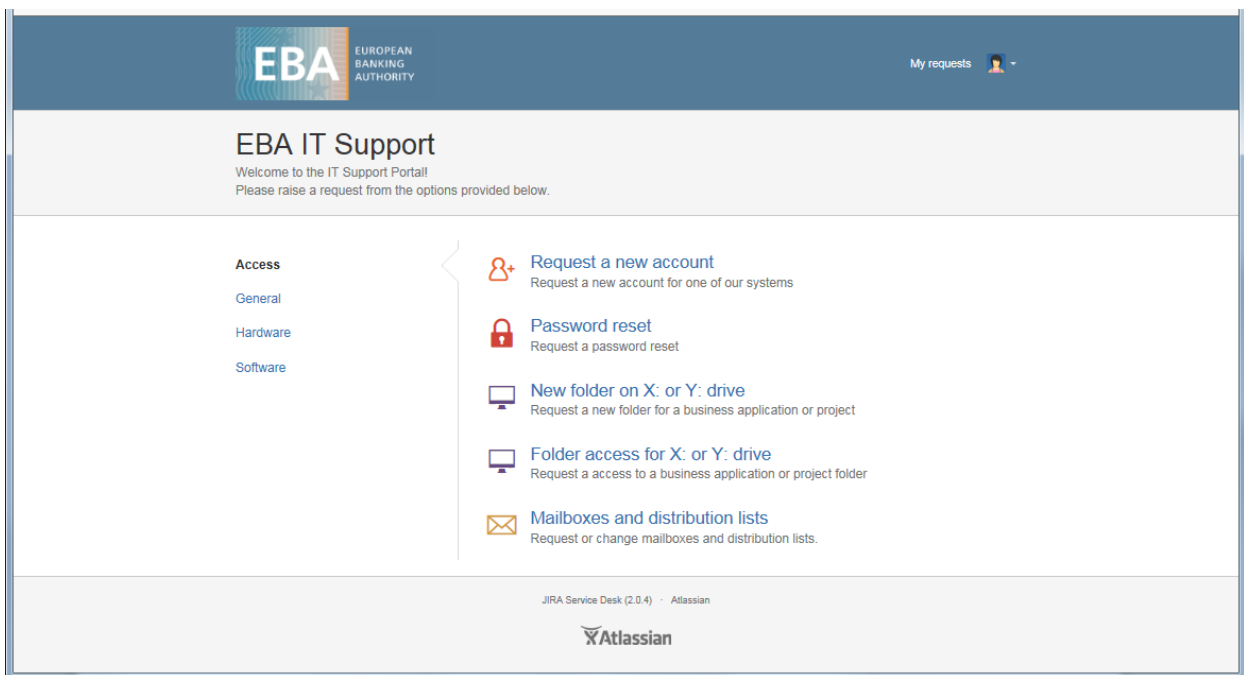
3.1 Launching IT Service Desk as Public User

1. From EBA Intranet main menu, click on Quick Links/ Links/EBA IT Support

2. Insert username and password and click 'Log In'. (same as Windows credentials)

3. The landing page of IT Service Desk is as follows:

3.2 Launching IT Service Desk as *Owner*, *DMO* or *Head of IT* (in case of approvals)
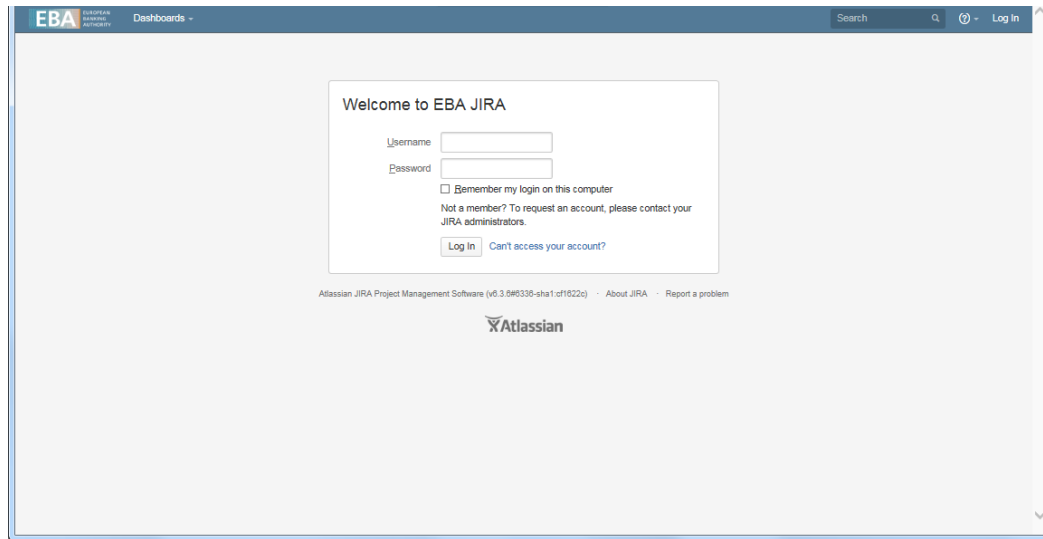
Folder *Owner, DMO* or '*Head or IT*' have two options to log in:

1. Click on the email received regarding the request of approval. Clicking on the email will automatically launch the IT Service Desk on the approval page.

or

2. Log in Jira following the steps below:

    i.   Launch the internet web browser

    ii.   Insert the URL   http://jira.eba.europa.eu/ and press 'Enter'.

     iii.   Insert both username and password (same as Windows credentials) and then click 'Log In'.

     iv.   The landing page looks as follows:

The requests assigned to the user are shown on the top right of the landing page.

In case the user wants to see the tasks assigned to him he needs to follow the next steps:
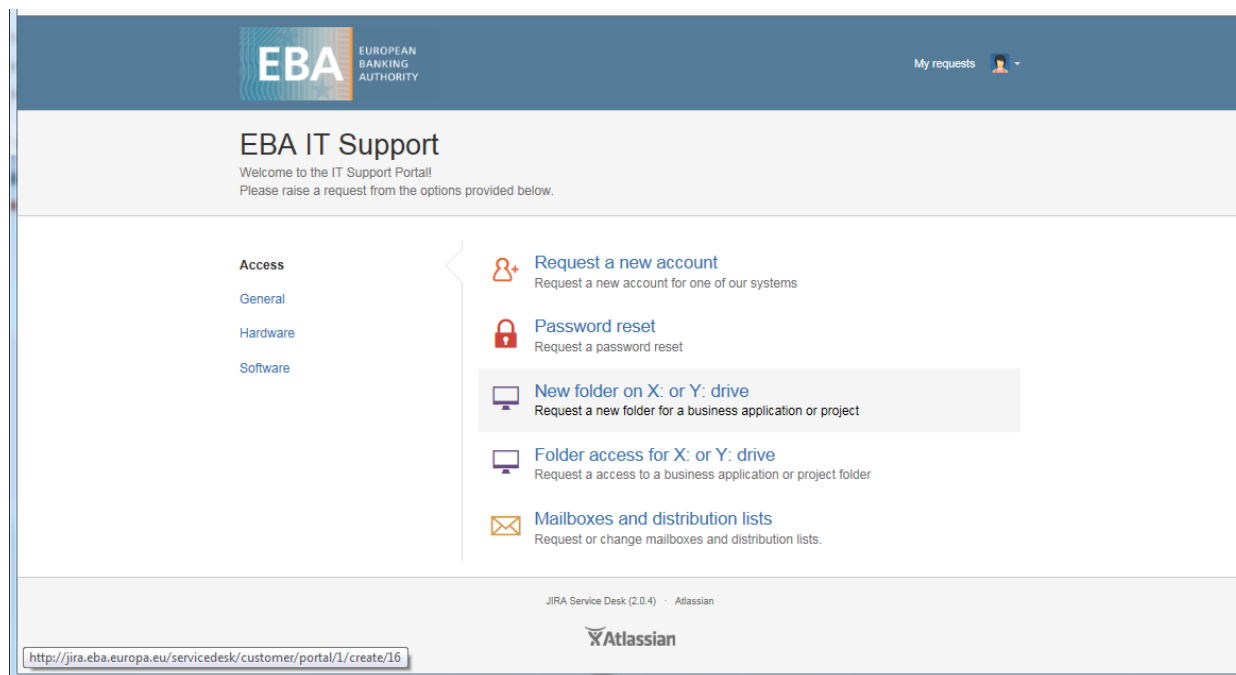
1. From main Menu/ Dashboards, click on 'Manage Dashboards'

2. From the list of Dashboards available, choose 'Approval Managers Dashboard'

3. Make this Dashboard favourite by clicking 'add is as favourite'

4. Following the steps above the landing page changes to:

The landing page is as follows
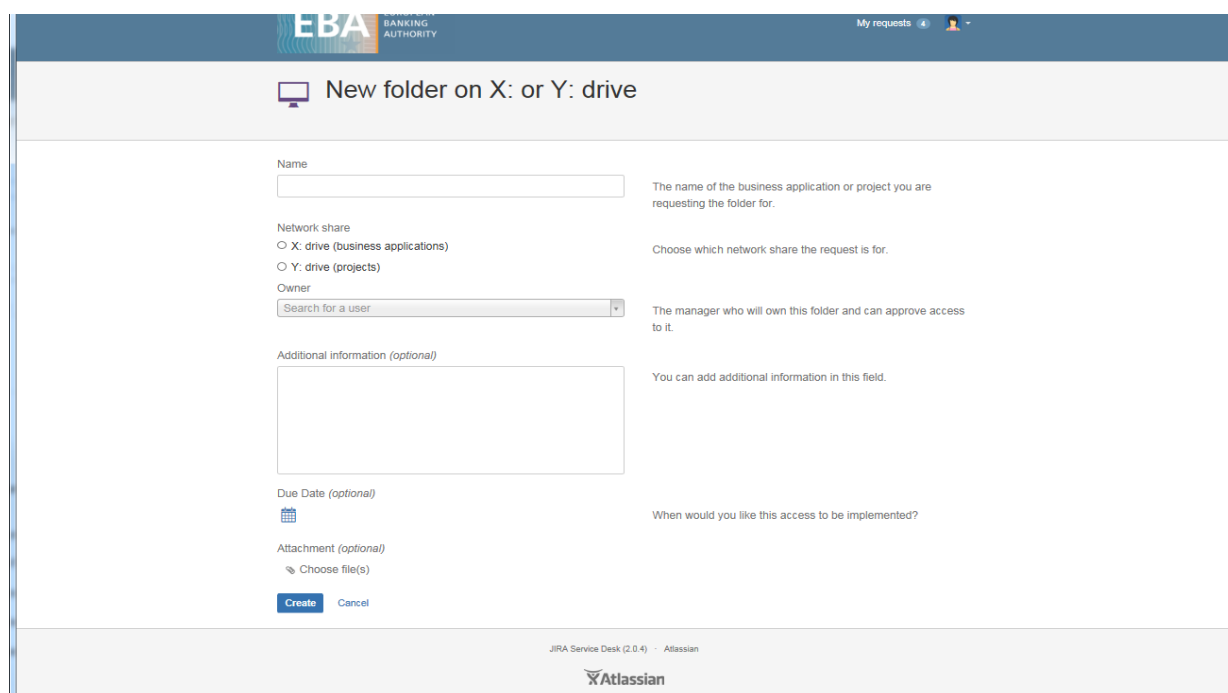
4. Request for Folder creation

This section describes the necessary steps to request a folder creation (Business or Project).

1. From the IT Service Desk Landing page choose "New Folder on X:or Y:Drive".

By Selecting the option "New folder on X: or Y: Drive" the following form is presented:

2. Fill all the necessary information in the form and click on 'Create'.

Name Field: Name for the Project or Business Application the user requests the Folder to be created for.

Network Share: Business Application (X:Drive) or Project Folder (Y:Drive).

Owner: Name of the manager who will own the folder and can approve access to it.

Additional Information: Additional information about the requested Folder.(optional).

Due Date: Date for the requested Folder to be created.(optional).

Attachment: The user can browse an attachment if required (optional).

Upon creation of the request for folder creation, an automatic email is generated requesting the *Owner* to approve or reject the request.

4.1   Monitoring the Request

The user can monitor the state of the request from the main landing page of the Service Desk by clicking on 'My requests'.

Any new update in the request generates an automatic email which is sent to the user's mailbox, informing about the latest status.
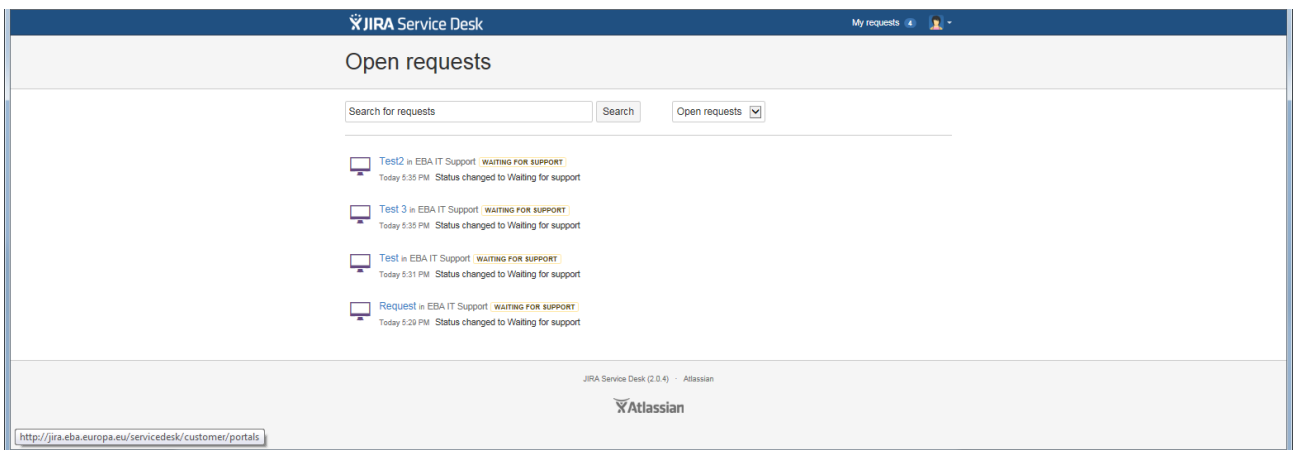
5. Approval of folder creation request

All requests for folder creation, for both Project and Business Applications need to be approved by:

1. *Owner*

2. *DMO*

3. *Head of IT*.

5.1 *Owner* Approval

When a Request for folder creation is generated, the user specified as *Owner* will be automatically assigned to an Approval request.

The *Owner* will receive an automatic email and a notification when accessing JIRA, with the details of the 'Folder creation request' assigned to him.

The *Owner* can approve or reject the request, by clicking

.
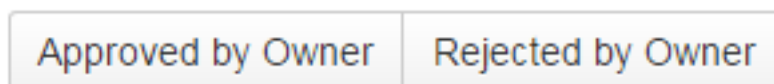
 The *Owner* approves the request.

The user is prompted to add an optional comment

The request is then marked as approved by *Owner* and automatically assigned to the Document Management Officer for the second step of approval.
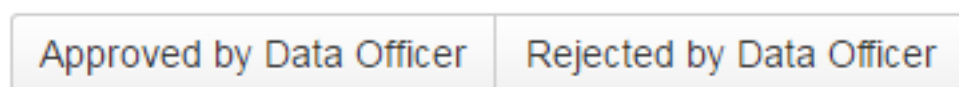
 The *Owner* rejects the Request

It is marked as rejected by *Owner* and automatically moved to the "Rejected" step. This then transit the Support Ticket to "Waiting for Support" and alerts IT Support.

5.2 *DMO* Approval

If the *Owner* has approved the request, the request will be assigned to the *DMO*.

The *DMO* can then approve or reject the request, by clicking

Approved by Data Officer	Rejected by Data Officer

➡ **The *DMO* approves the Request**

The *DMO* is prompted to add an optional comment.

The request is marked then as approved by *DMO* and automatically assigned to the *Head of IT* for the final step of approval.
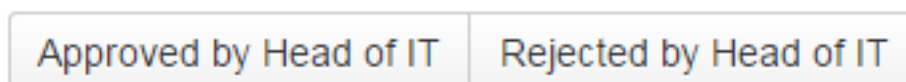
The *DMO* rejects the Request

It is marked as "rejected by Data Officer" and automatically moved to the "Rejected" step. This then transit the Support Ticket to "Waiting for Support" and alerts IT Support.

5.3 *Head of IT* Approval

The folder creation requires the approval for *Head of IT* . For each "Create Folder Request" an approval request needs the *Head of IT* validation in order to be implemented.

If the *Owner* and the *DMO* have approved the request, then the request is assigned to the *Head of IT*.

The *Head of IT* can then approve or reject the request, by clicking

Approved by Head of IT	Rejected by Head of IT

The *Head of IT* approves the Request
He is prompted to add an optional comment

The request then is marked as approved by *Head of IT* and automatically assigned to IT Support to proceed with the folder creation.

The ´*Head of IT*´ rejects the Request

It is marked as rejected by *Head of IT* and automatically moved to the "Rejected" step.
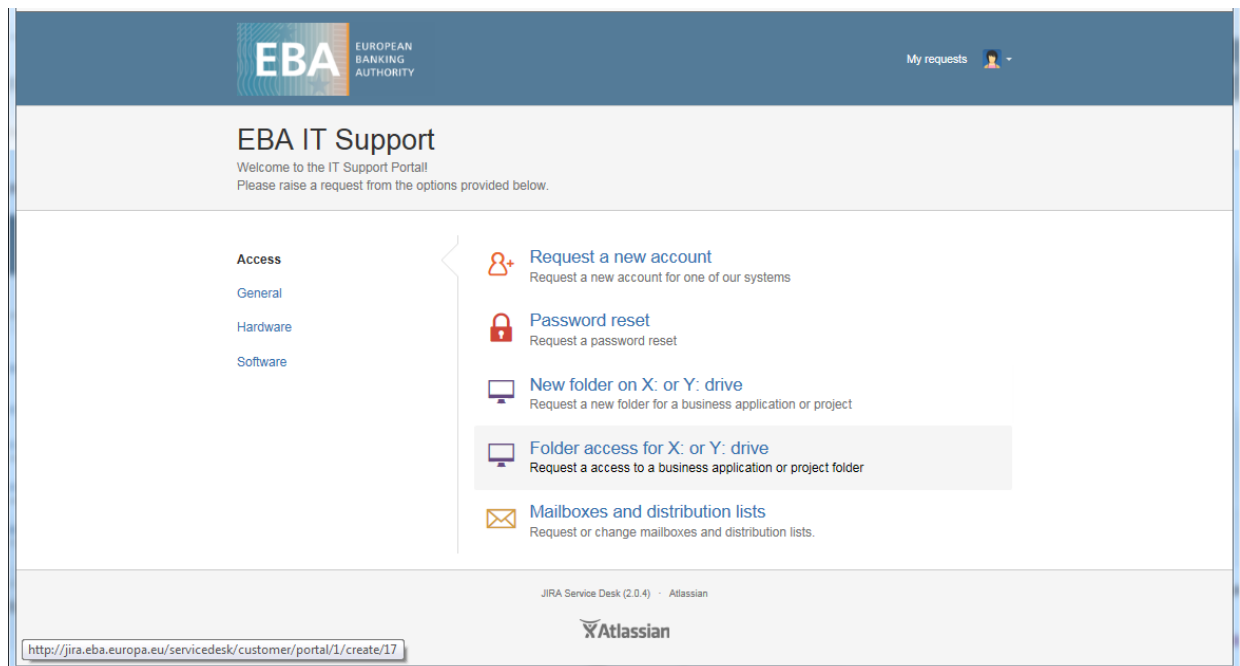
This then transit the Support Ticket to "Waiting for Support" and alerts IT Support that the request has finished the approval process and has been rejected.

6. User's request for folder access and approval process.
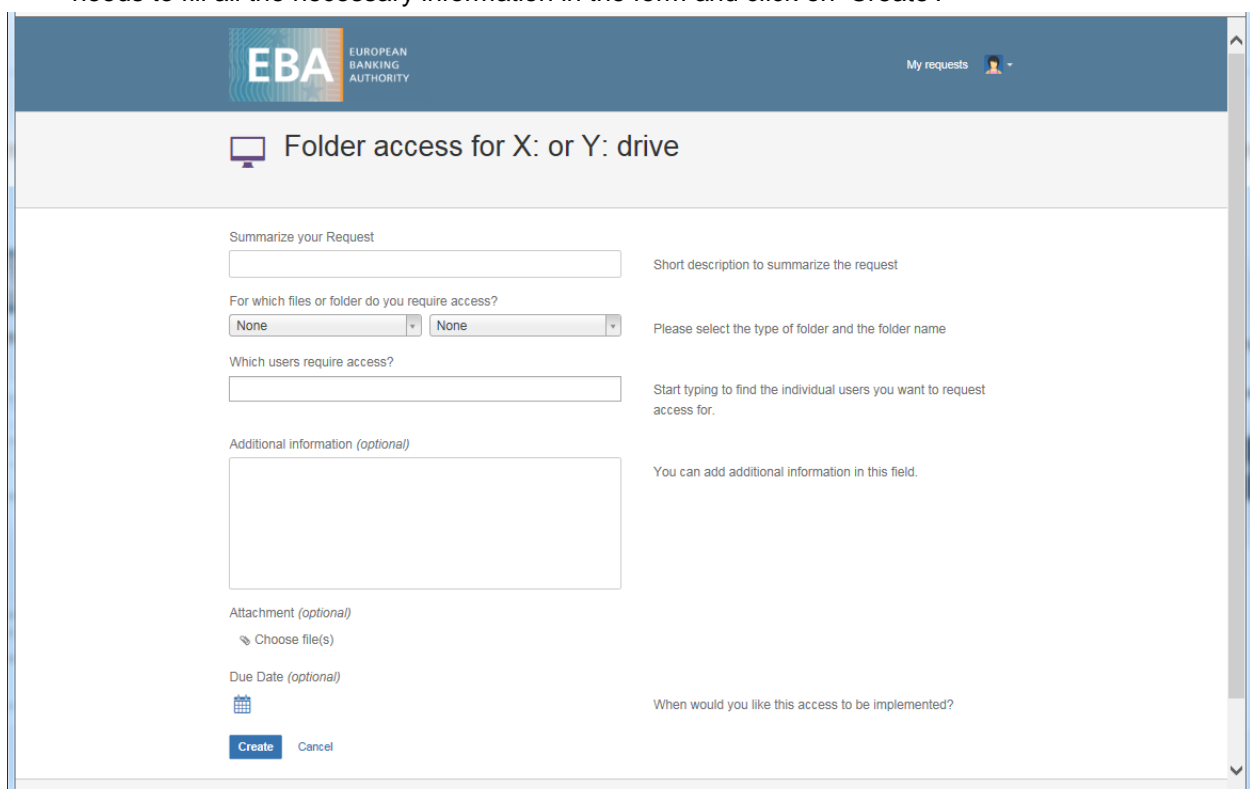
6.1 Creating a Request for Folder access

This section describes the necessary steps to request access to an existing Folder (Business or Project).

1. From the IT Service Desk Landing page choose " Folder access for X: or Y: drive".

2. By Selecting the option "Folder access for X: or Y: drive" the following Form is presented. The user needs to fill all the necessary information in the form and click on 'Create'.

Summarize your request: Short description why the access is needed.

For which files or folders do you require access: Type of folder and folder name (ie. 'Projects', 'P201609001').

Which users require access: Individual names of users who are requested to access the folder.

Additional Information: Any additional information about the access request .(optional).

Attachment: The user has the option to attach a document. (optional).

Due Date: Due Date for the request (optional).

Upon creation of the access request, an automatic email is generated requesting the *Owner* to approve or reject the request.

6.2   Monitoring the state of the Request

The user can monitor the state of the request from the main landing page of the Service Desk by clicking on 'My requests'.

Any new update in the request generates an automatic email which is sent to the user's mailbox, informing about the latest status.

6.3   Approving an access Request

Upon creation of the access request, the *Owner* will be automatically assigned to a folder access approval request.

The Owner will receive an automatic email and a notification when accessing JIRA with the details of the request.

The *Owner* can then approve or reject the request, by clicking

Approved	Rejected

The *Owner* approves the Request.

The Request is then marked as approved by *Owner* and automatically moved to the "Approved" step.

This then transit the Support Ticket to "Waiting for Support" and automatically assigned to IT Support to proceed with the the provision of access to the folder.

The *Owner* rejects the Request

The user is prompted to add an optional comment

The request is then marked as rejected by *Owner* and automatically moved to the "Rejected" step. This then transit the Support Ticket to "Waiting for Support" and alerts IT Support.

7. Annex I- User Roles and EBA Staff assigned to each Role

User	Short description
Public User	All EBA Staff
Owner	EBA Management
DMO	
Head of IT	