

Service Desk User Guide

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Service Desk User Guide

Find instructions in this guide for the following:

- How to create Server and Database Access Requests (SDAR)
- Manager Approval Process
- Data Owner or Designee Approval Process
- Access Group Approval Process

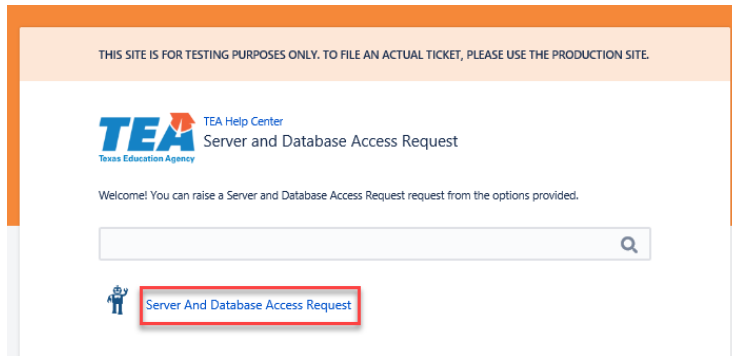
Process for Creating Requests

You can now create SDAR at one location, the Service Desk. This section briefly explains the process for creating a service desk request for SDAR.

1. Click the TEA Help Center link:

<https://tealprod.tea.state.tx.us/servicedesk/servicedesk/customer/portal/4>

2. On the next screen, click **Server and Database Access Request**.



3. The following form will display.

The screenshot shows the 'Server And Database Access Request' form in the TEA Help Center. The form includes the following fields and sections:

- Summary:** A text input field.
- Type of Request:** Radio buttons for 'Server' and 'Database'.
- Date Requested:** A date picker with a calendar icon.
- Date Required By:** A date picker with a calendar icon.
- Business Justification (optional):** A large text area.
- Business area/Application Name (optional):** A text input field.
- Database Business Justification (optional):** A text input field.
- Additional Access (Notes) (optional):** A large text area.
- Manager Approval:** A section with a 'Search for a user' dropdown and a 'Data Owner or Designer' dropdown.
- Access Approval Group:** A dropdown menu with a search icon and a list of users.
- Priority:** A dropdown menu with 'Medium' selected.
- Buttons:** 'Create' and 'Cancel' buttons.
- Footer:** 'Powered by Jira Service Desk'.

4. The SDAR form will display with the following fields populated:

- a. **Raise this request on behalf of;** service desk uses Active Directory and your name will appear in this field.

This close-up shows the 'Raise this request on behalf of' dropdown menu. The selected user is 'Morris, William'. The dropdown is highlighted with a red border.

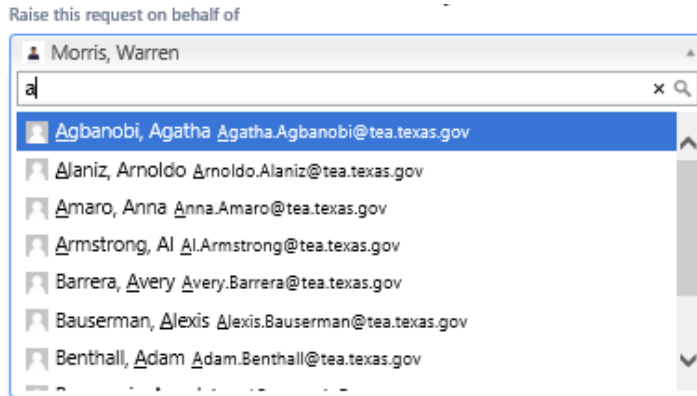
- b. **Access Approval Group;** default names will appear.

This close-up shows the 'Access Approval Group' dropdown menu. The selected group is 'Bermudez, Tony' and another user 'Morris, Laura' is visible. A mouse cursor is pointing at the dropdown. The dropdown is highlighted with a red border.

- c. **Priority;** defaults to **Medium**. You can display other options by clicking on the down arrow.

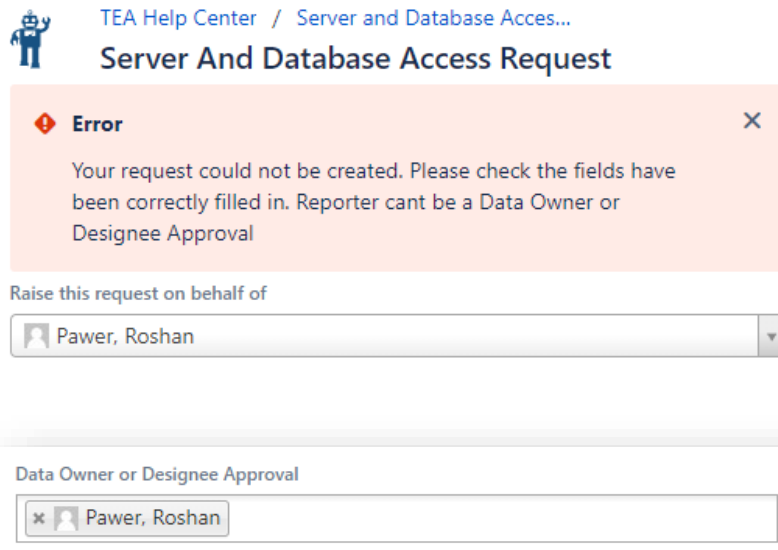


- 5. You can change the default name of the **Raise this request on behalf of** field. Begin typing the name you wish by typing the name you want to appear. As you begin to type names will appear in the dropdown **Raise this request on behalf of**



- a. Reporter (who creates the ticket) can't be a **Data Owner or Designee Approval**

Error!!



- b. Reporter (who creates the ticket) can't be an **Access Approval Group**

Error!!

The screenshot shows a web interface for creating a ticket. At the top, there is a breadcrumb trail: "TEA Help Center / Server and Database Acces...". Below this is the title "Server And Database Access Request". A prominent orange error box contains the text: "Error: Your request could not be created. Please check the fields have been correctly filled in. Reporter cant be a Access Group Approval". Below the error box is a dropdown menu labeled "Raise this request on behalf of" with "Pawer, Roshan" selected. At the bottom, there is a field labeled "Access Approval Group" which also contains "Pawer, Roshan".

- 6. Complete all mandatory fields.

TEA Help Center / Server and Database Acces...
Server And Database Access Request

Raise this request on behalf of
Morris, Warren

Summary
Type in a identifying label.
Access Requested For
Name or ID of person needing access
Network ID
Date Requested:
Type of Request
 Server
 Database
Date Required By
The date the access is needed by
If Others, please explain: (optional)
Business Justification (optional)
Business area/Application Name: (optional)
Database Business Justification (optional)
Additional Access (Notes) (optional)

Manager Approval
Search for a user
Managers will Review and Approve or Decline submitted request.
Data Owner or Designee
Search for a user
Access Approval Group
Benavides, Tom Dennis, Laura
Priority
Medium
Create Cancel

Powered by Jira Service Desk


7. This form can be used for both Server and Database requests but only one selection is mandatory:
 - a. If **Server** is checked the following fields will display and are mandatory for creating a Server request ticket.

Type of Request

Server

Database

Date Required By



The date the access is needed by

Server Type:

Windows

Unix

Linux

Server name:

Server Details:

Server Environment(s)

Development

Test

Performance

Production

Other

Server Business Justification

b. If **Database** is checked the following mandatory fields will display:

Type of Request

Database Access

Server Access


If Others, Please Explain *(optional)*

Business area/Application Name *(optional)*

Database Access

Database Platform	Server	Database Name
None ▾	<input type="text"/>	<input type="text"/>
Read/Read-Write	Environment Type	Role/Group/Schema
None ▾	None ▾	<input type="text"/>

Database Business Justification



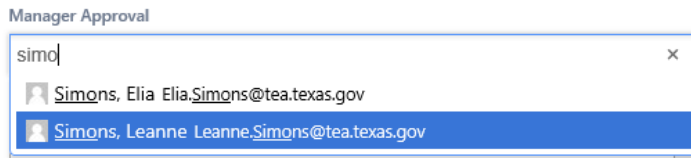
If you have multiple entries for "Role/Group/Schema's " to the single DB. Please enter all the values in single field with comma separation.

- i. Select a **Database Platform** from the dropdown (DB2, Oracle, Sybase, SQL Server).
- ii. Enter the **Server** details
- iii. Enter the **Database Name** which you need access to
- iv. Select **Read or Read-Write** from the dropdown
- v. Select an **Environment Type** from the dropdown (Development, Test, Production, Training, Others)
- vi. Enter the **Database Business Justification**
 1. For **multiple** Database Access requests, you can click the plus sign radio button and additional fields will display. There is no limit to the number of Database Access requests that can be entered.



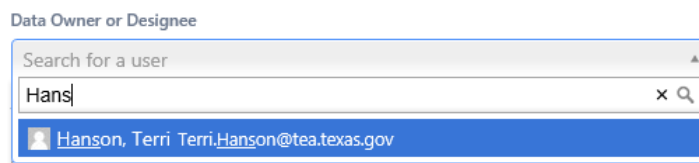
8. You will need to enter your managers name and data owner for your request.

a. **Manager Approval** field:



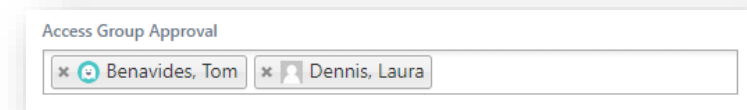
A screenshot of a dropdown menu titled "Manager Approval". The search bar contains the text "simo". Two user entries are visible: "Simons, Elia Elia.Simons@tea.texas.gov" and "Simons, Leanne Leanne.Simons@tea.texas.gov". The second entry is highlighted in blue.

b. **Data Owner or Designee** field:



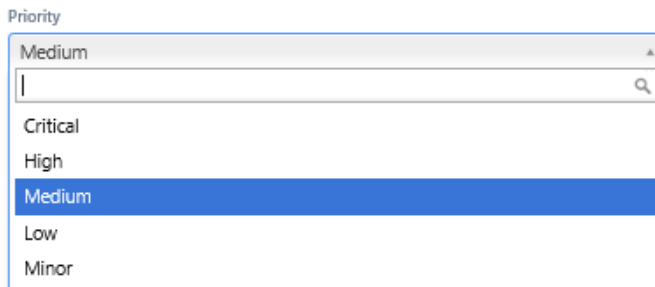
A screenshot of a dropdown menu titled "Data Owner or Designee". The search bar contains the text "Hans". One user entry is visible: "Hanson, Terri Terri.Hanson@tea.texas.gov". The entry is highlighted in blue.

c. **Access Group Approval** Field



A screenshot of the "Access Group Approval" field. It shows two user entries: "Benavides, Tom" and "Dennis, Laura". Each entry has a small 'x' icon to its left, indicating it can be removed.

9. You can change the priority of your request.



A screenshot of a dropdown menu titled "Priority". The search bar is empty. The menu lists five options: "Medium", "Critical", "High", "Medium", and "Low", "Minor". The second "Medium" option is highlighted in blue.

10. Once you have all mandatory fields entered you can press the **Create** button to submit your ticket.

Create

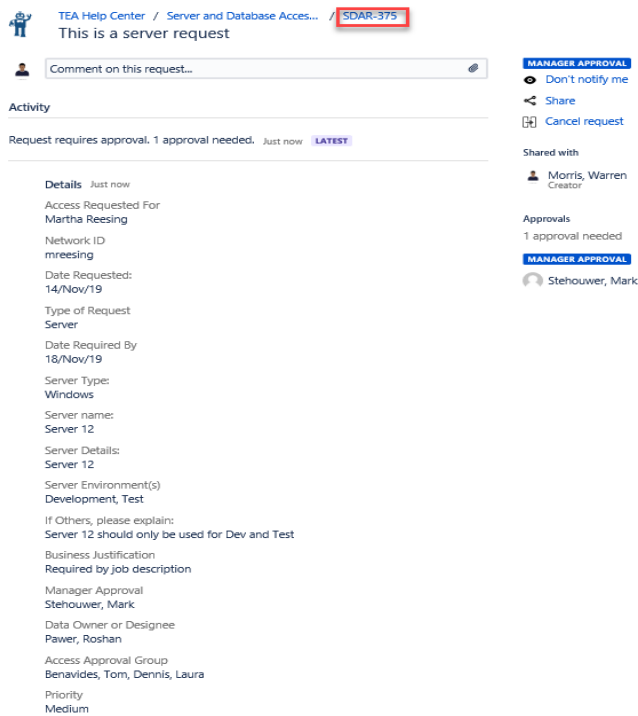
a. Error messages for this form will appear as follows:

i. The form does not scroll to error messages after pressing the **Create** button, you will need to scroll up to find which mandatory field is missing

a valid value. Field messages will appear as **Please provide a valid value for field '<field name>'**.

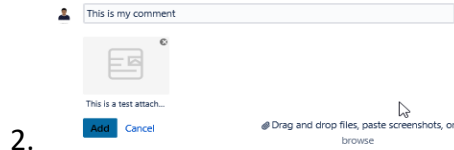
11. Once your ticket is created a ticket number is assigned to your request and the Activity screen will appear with the information you requested.

a. A ticket number is created and appears on the activity screen.



b. Click the comment field to add them. When you begin to type the **Add, Cancel** buttons will appear in addition to the attachment **browse** link will appear.

- i.
- ii.
- iii. Clicking the **browse** link will allow you to attach a file to your ticket:
1.

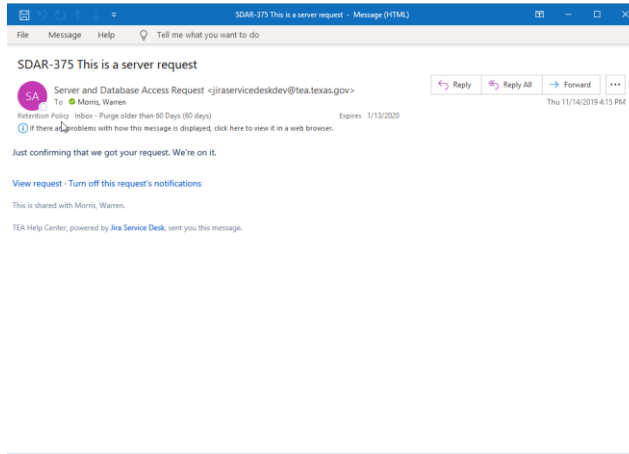


2.




3. Once the comments are updated click on **Return for Approvals**



c. You will also receive an email confirmation. Clicking the **View request** link will display the activity screen displayed in step 11.



12. Other actions you can take while on the activity screen:

- a. Clicking the **Don't notify me**  [Don't notify me](#) link will disable notifications for the specific issue.
- b. Clicking the **Share**  [Share](#) link will allow you to send your request to one or multiple people in TEA.
- c. Clicking the **Cancel request**  [Cancel request](#) link will close your request.

Approval Process

Process for Manager Approving Requests

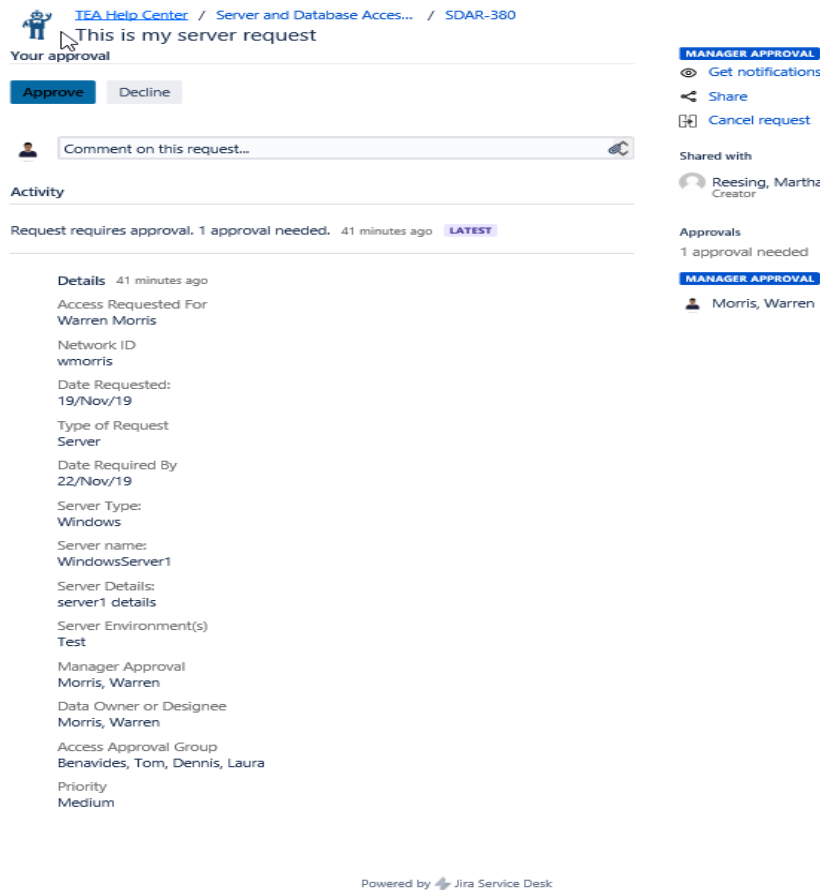
Manager Approvers will be notified by email when a request has been created.

1. Click the **Click Here for Approve/Decline** link.

[jiraservicedeskdev] Reeing, Martha created Request SDAR-402 for [Server] access



2. After clicking the **Click Here for Approve/Decline** link the following web page will appear. You will see the status is in **Manager Approval**:



Note: Comments can be added by clicking the on the comment field. See step 11 in the [Process for Creating Requests](#) section of this document.

- a. If you click the **Approve** button the approve the status of the ticket changes from **Manager Approval** to **Data Owner or Signee Approval**. You will also see the activity describing of the status change and who approved the ticket.

The screenshot displays a service desk request interface with two columns of options. The left column, under a 'MANAGER APPROVAL' header, includes 'Get notifications', 'Share', 'Cancel request', 'Shared with Reesing, Martha (Creator)', and 'Approvals: 1 approval needed'. The right column, under a 'DATA OWNER OR DESIGNEE APPR...' header, includes 'Get notifications', 'Share', 'Shared with Reesing, Martha (Creator)', and 'Approvals: 1 approval needed'. Below these is a 'MANAGER APPROVAL' header with 'Morris, Warren' and a 'DATA OWNER OR DESIGNEE APPROVAL' header with 'Morris, Warren'. The main content area shows the breadcrumb 'TEA Help Center / Server and Database Acces... / SDAR-424' and the title 'Server request for Casey Phillips'. Under 'Your approval', there are 'Approve' and 'Decline' buttons, a comment field, and an 'Activity' section. The activity log shows: 'Request requires approval. 1 approval needed. Just now LATEST' and 'Your request status changed to Data Owner or Designee Approval. Just now'. A final activity entry shows 'Morris, Warren approved this request. Just now' with the text 'Your request was APPROVED and the status changed to Data Owner or Designee Approval'.

- b. If you click the **Decline** button the activity screen will change from **Manager Approval** to **Return for Updated**. You will also see the activity describing of the status change and who declined the ticket. Must include the reason for decline so customer updates the required information.

MANAGER APPROVAL

- Get notifications
- Share
- Cancel request

Shared with

Reesing, Martha
Creator

Approvals

1 approval needed

MANAGER APPROVAL

Morris, Warren

RETURN FOR UPDATE

- Don't notify me
- Share

Shared with

Reesing, Martha
Creator

TEA Help Center / Server and Database Acces... / SDAR-421

Server Request for mreesing

Comment on this request...

RETURN FOR UPDATE

- Don't notify me
- Share

Shared with

Morris, Warren
Creator

Activity

Your request status changed to **Return for Update**. 3 minutes ago **LATEST**

Morris, Warren declined this request. 3 minutes ago
Your request was **DECLINED** and the status changed to **Return for Update**

- c. The creator of the ticket will receive an email that the request has returned for update.

SDAR-421 Server Request for mreesing

SA Server and Database Access Request <jiraservicedeskdev@tea.texas.gov>

To: Morris, Warren

Retention Policy: Inbox - Purge older than 60 Days (60 days) Expires: 1/21/2020

If there are problems with how this message is displayed, click here to view it in a web browser.

Morris, Warren changed the status to Return for Update.

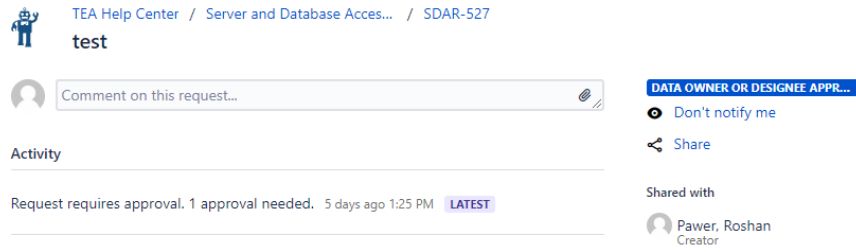
[View request](#) · [Turn off this request's notifications](#)

This is shared with Morris, Warren.

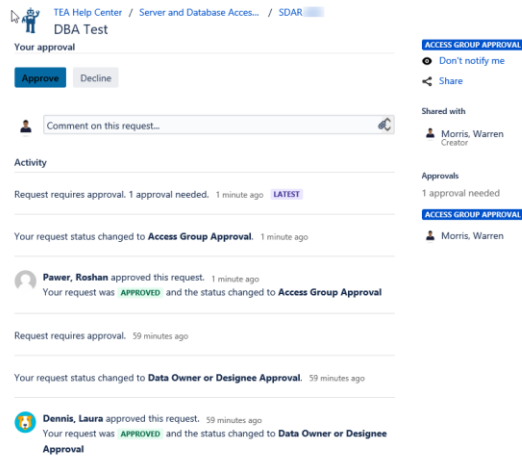
TEA Help Center, powered by [Jira Service Desk](#), sent you this message.

Process for Data Owner or Designee Approval Process

1. The data owner/designee will receive an email for approval. Click the link and the activity screen will appear:



- a. The Data Owner/Designee can approve the request by clicking the **Approve** button. The creator of the ticket will receive an email notification of the status change:



- b. Once approved the status will change from data owner/designee approval to **CA Support**:

TEA Help Center / Server and Database Acces... / SDAR-422

This is a database request for mreesing

Comment on this request...

CA SUPPORT

Don't notify me

Share

Shared with

Morris, Warren
Creator

Activity

Your request status changed to **CA Support**. Just now **LATEST**

Morris, Warren approved this request. Just now
Your request was **APPROVED** and the status changed to **CA Support**

Request requires approval. 31 minutes ago

Your request status changed to **Access Group Approval**. 31 minutes ago

Morris, Warren approved this request. 31 minutes ago
Your request was **APPROVED** and the status changed to **Access Group Approval**

Request requires approval. 1 hour ago

Your request status changed to **Data Owner or Designee Approval**. 1 hour ago

Dennis, Laura approved this request. 1 hour ago
Your request was **APPROVED** and the status changed to **Data Owner or Designee Approval**

- c. The Data Owner/Designee can decline the request by clicking the **Decline** the button. The creator of the ticket will receive an email notification of the status change:

TEA Help Center / Server and Database Acces... / SDAR-428

Testing Data Owners

Comment on this request...

RETURN FOR UPDATE

Don't notify me

Share

Shared with

Morris, Warren
Creator

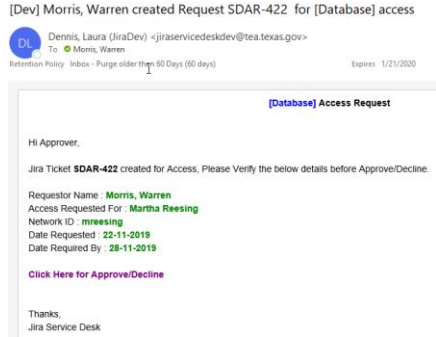
Activity

Your request status changed to **Return for Update**. Just now **LATEST**

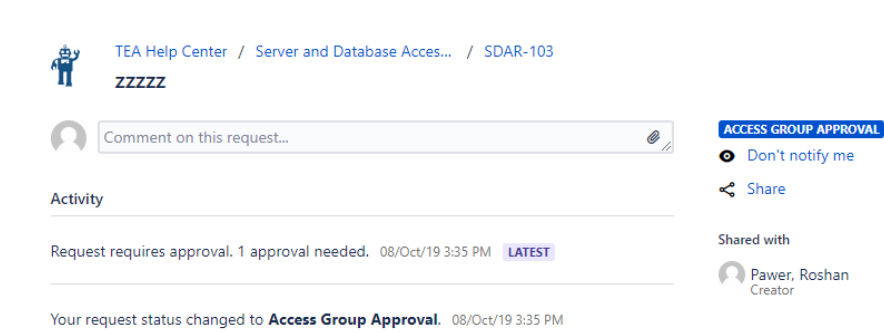
Morris, Warren declined this request. Just now
Your request was **DECLINED** and the status changed to **Return for Update**

Process for Access group Approval Process

1. The Access Group approval will receive an email for approval. Click the link and the activity screen will appear:



- a. The access group approval can approve the request by clicking the **Approve** button. The creator of the ticket will receive an email notification of the status change:



- b. Once approved the status will change from Access group approval to **CA Support**:

TEA Help Center / Server and Database Acces... / SDAR-422

This is a database request for mreesing

Comment on this request...

CA SUPPORT

Don't notify me

Share

Activity

Your request status changed to **CA Support**. Just now **LATEST**

Morris, Warren approved this request. Just now
Your request was **APPROVED** and the status changed to **CA Support**

Request requires approval. 31 minutes ago

Your request status changed to **Access Group Approval**. 31 minutes ago

Morris, Warren approved this request. 31 minutes ago
Your request was **APPROVED** and the status changed to **Access Group Approval**

Request requires approval. 1 hour ago

Your request status changed to **Data Owner or Designee Approval**. 1 hour ago

Dennis, Laura approved this request. 1 hour ago
Your request was **APPROVED** and the status changed to **Data Owner or Designee Approval**

Shared with

Morris, Warren
Creator

- c. The Access Group approval can decline the request by clicking the **Decline** the button. The creator of the ticket will receive an email notification of the status change:

TEA Help Center / Server and Database Acces... / SDAR-428

Testing Data Owners

Comment on this request...

RETURN FOR UPDATE

Don't notify me

Share

Activity

Your request status changed to **Return for Update**. Just now **LATEST**

Morris, Warren declined this request. Just now
Your request was **DECLINED** and the status changed to **Return for Update**

Shared with

Morris, Warren
Creator