08 March 2024

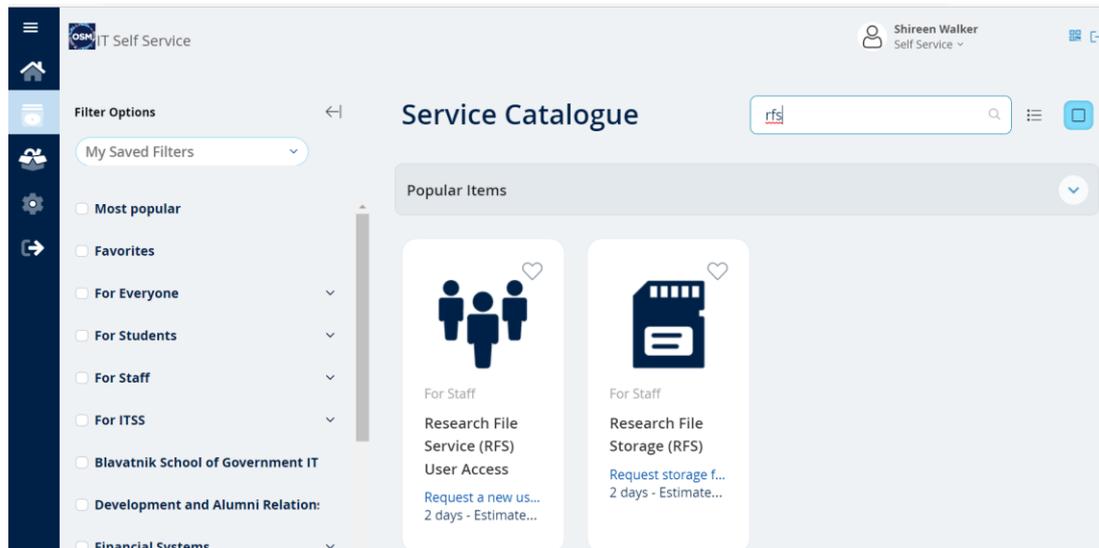# Research File Service (RFS): Owner Guidance

Requesting Research File Service (RFS) Storage

Access the <u>RFS service requests</u> in the IT Self Service catalogue. There are two RFS service requests available: **Research File Service (RFS) User Access** and **Research File Storage (RFS).**

- Select **Research File Storage (RFS)**
- Complete the form fields. You will be asked to provide a research project name, the names of two owners (one of which should be the PI. We do ask that you name two owners, in case one leaves or is absent), department, cost centre, ITSS name, the amount of storage you require and an expected project end date
- Click on Review & Submit
- You will receive confirmation emails to confirm that your RFS storage has been set up and with instructions on how to activate your CONNECT AD account
- Visit https://password.connect.ox.ac.uk to set a password for this account
- Use your Single Sign On (SSO) as your username
- You will be asked for a passcode when registering. Call the Service Desk for this on 01865 612345
- Once active, your CONNECT AD account will give you access to RFS storage and RFS self-service, to be able to apply user read-only or read/write access permissions.

Resetting your CONNECT password

If you already have a CONNECT AD account but have forgotten the password, you can reset it using the instructions at https://help.it.ox.ac.uk/change-connect-password (method 2).

Connecting to RFS Storage from home via VPN

If you are connecting to your RFS storage from outside of the university network (e.g. at home or on site), you will need to connect using the Oxford Virtual Private Network (VPN). Instructions on how to register and connect to the Oxford VPN can be found at https://help.it.ox.ac.uk/vpn

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Mapping a drive to your RFS project storage

Instructions on how to map a CONNECT network drive for Windows, Mac and Linux clients can be found on the IT Services Website https://help.it.ox.ac.uk/map-connect-drives

To access your RFS Project, map a drive to \\connect.ox.ac.uk\RFS (you will need to connect to VPN first if you are not on the network).

RFS should be added to the R drive if possible

Drive: Folder:

R   RFS: \\connect.ox.ac.uk\RFS

You will need to use your CONNECT AD account for this mapping - enter Username as "CONNECT\SSO" and your CONNECT AD password.

You will then see any projects you own or have been given access to.

Adding users: Internal users

! Before requesting access to RFS storage, all internal users need a CONNECT AD account. Users can request this through the RFS User Access service request on OSM. Anyone who already has a CONNECT AD account can skip this step.

Requesting RFS User Access for a new internal user (provides a CONNECT AD account)

- Access the RFS service requests in the IT Self Service catalogue
- Select **Research File Service (RFS) User Access**
- Complete the form
- Click on Review & Submit
- Both the requester and new user will receive an email with the instructions on how to activate their CONNECT AD account. The new user will need to call the Service Desk on 01865 612345 for the passcode they will require whilst registering.
- Once active, their CONNECT AD account will give them access to RFS storage, but they will only be able to see a project once one of the owners gives them read-only or read/write permission.

Please note Owners must ensure that access is revoked PROMPTLY when staff or students no longer require access to the project data, for example due to leaving the University or changing roles. Owners must not rely on University card expiry for this purpose.

Owners must ensure that all access permissions are reviewed on at least an annual basis.

Automatic screen locking after a defined period of inactivity must be configured on any end-user device used to access the service, including any self-managed systems. Users should not rely solely on this to protect access to data, and should lock the screen manually or log out whenever leaving systems unattended.

Adding users: External Guests

Guidance:

- Owners must ensure that access is **only granted to external users** where necessary and revoked PROMPTLY when access in no longer required to the project data.

- **External user access must NOT be given to Oxford university accounts, or external accounts linked to Oxford university users.**
- Owners are responsible for ensuring that all access permissions are reviewed on at least an annual basis.

External user access and permission management is granted from the self-service portal. This can be found at https://self-service.rfs.ox.ac.uk. Ensure you are connected to the university network or have the Oxford VPN active.

1. Select *'RFS Guest Management'* on the self-service homepage.
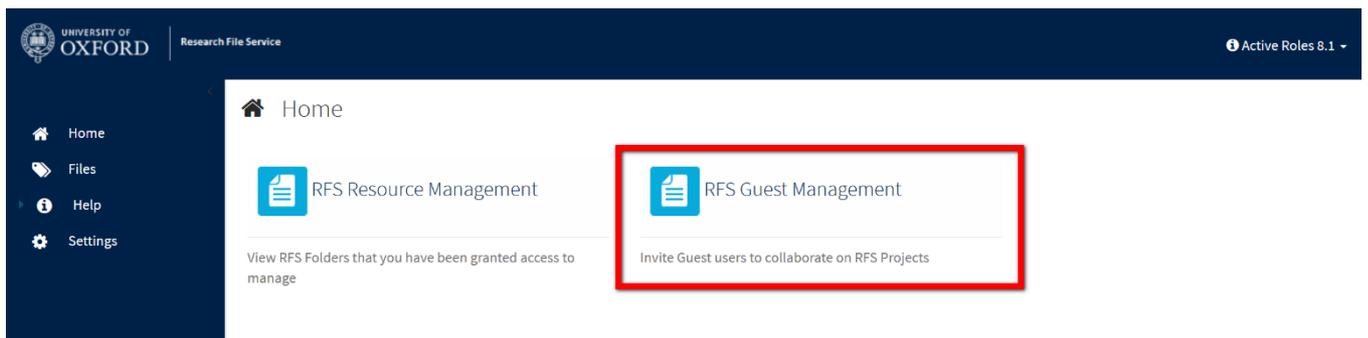
2. From here, select *'New RFS Guest'* on the right side of the page.
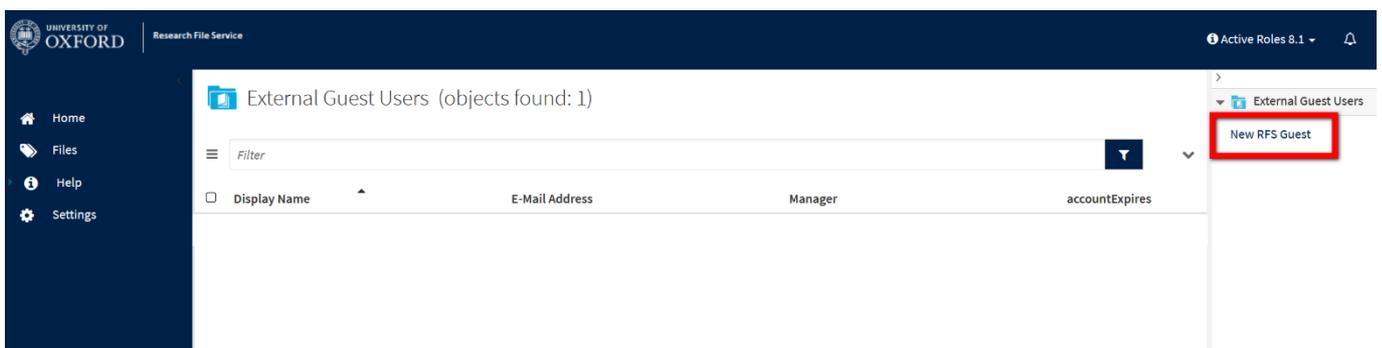
3. Fill in the guest details. **Be wary that in this section, the text entry boxes are case sensitive**. In this area you are asked to add in primary and secondary owners for the guest account. These are usually the same as the PO and SO from the project. Although not mandatory, it is good practice to add a secondary owner in case the manager for the guest account is not available to amend the account permissions. Additionally, although not mandatory, it is also good practice to set an account expiry date, to ensure the guest does not have access to your data for longer than needed.

4. Hit '*Finish'* on the bottom right hand corner and wait for the pop up box to disappear. This can take up to two minutes, so don't close the page while the system is provisioning the account. It can take up to two hours for an invite to arrive in a guest's mailbox. Please ask your guest to check their spam/junk folders if they can't see it.
5. Once the guest account is setup, you see a list of guest accounts you have invited. Tick the checkbox on the left of the *DisplayName* column and then press *'Member Of'* on the right hand side of the screen

6. Press *'Add'* and then search for the project group you wish to add the user to. **The search field here is case sensitive, so be sure to type out the project name exactly as it appears in RFS.** Press the check box next to the project name to select it. If you wish to restrict access to the group for a period of time, hit *'Temporary Access'* in the bottom left corner, otherwise click *'OK'*.
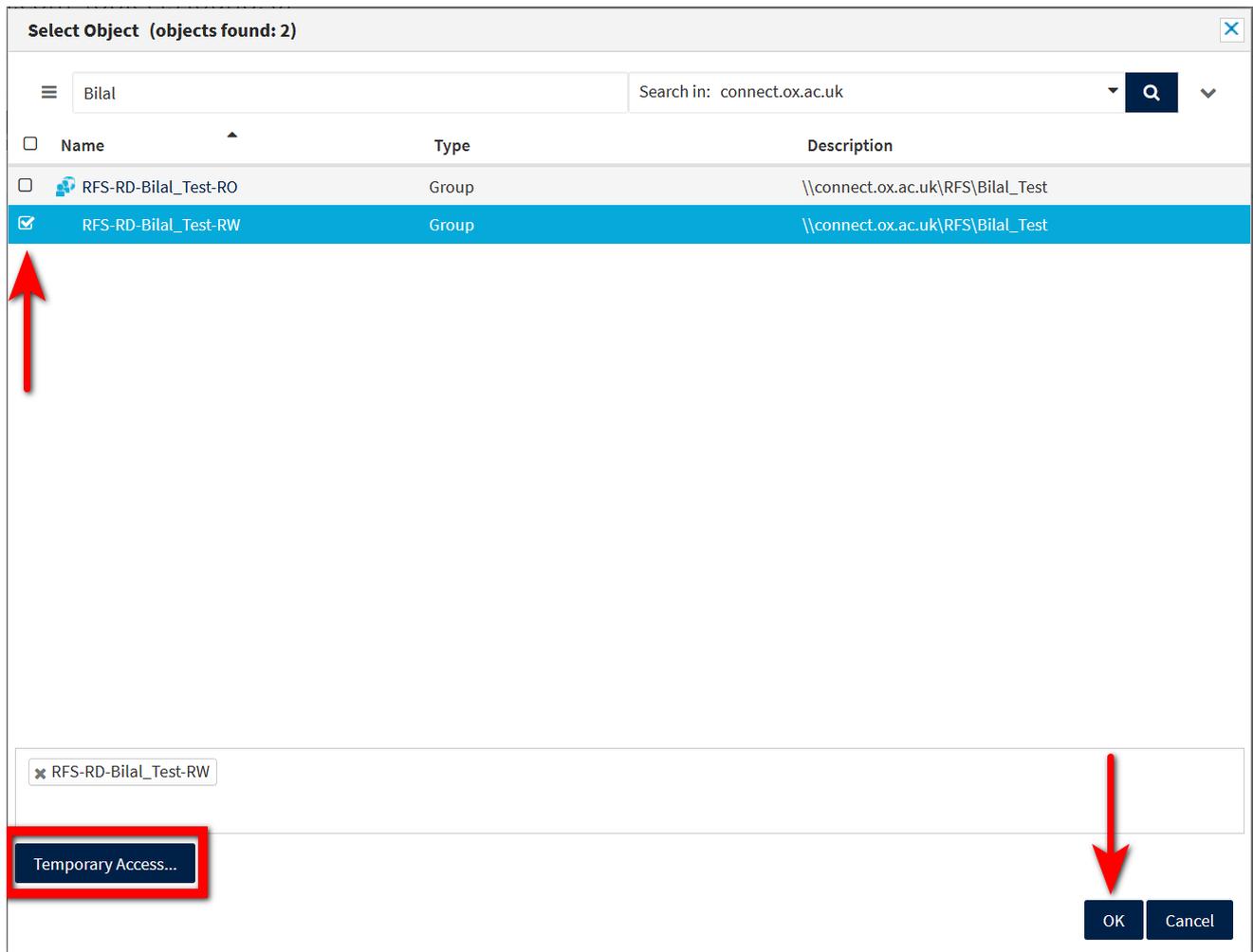
7. The guest now has access to the project group you selected. They are able to access files stored in RFS by visiting https://files.rfs.ox.ac.uk and signing in with their email and multi factor authentication, setup in the sign-up process.

Resending an invite to External Guests

If an external guest has not received the Oxford NEXUS invitation to setup their account, you are able to resend the invitation. To do this you will need to:

1. Visit https://self-service.rfs.ox.ac.uk and login using your CONNECT AD Account.
2. Select *'RFS Guest Management'*
3. Select the guest you wish to resend the invite to by clicking once on their name
4. In the resulting pop-up, under the '*RFS Guest Status'* dropdown field, select the *'Resend Invite'* option

5. Press *'Save'* and wait for the pop-up to close. The invite has now been re-sent. It can take up to two hours for a guest to receive the invitation. Please ask them to check their junk/spam folders for the invite. The subject line on the invite will say ***'Nexus365 has invited you to access applications within their organisation'.***

Give a new internal user access to your storage through RFS Self Service

As an owner you can give others access to your project storage, through RFS Self Service. Any user you add must already have a CONNECT AD account. If they don't, they should request one through the Requesting RFS User Access for a new user process above

- Open a browser and navigate to https://self-service.rfs.ox.ac.uk (on University network, or with the University VPN active)
- You will be prompted to enter your CONNECT login details using the format **CONNECT\SSO** and click Sign In (may look different on Mac or Linux)
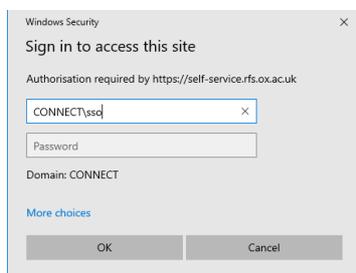
- Once you are on the home page, click on RFS Resource Management

- Allow the resources page to load then select the Resource Group you want to allow your user to access (e.g. If you want your user to only have "Read Only" access to "Project_Y", click on RFS-RD-Project_Y-RO)
- Allow the resource page to load then click on the Add button
- Allow the select object page to finish loading then enter the new user's name or SSO in the search box then click the search icon to return the results
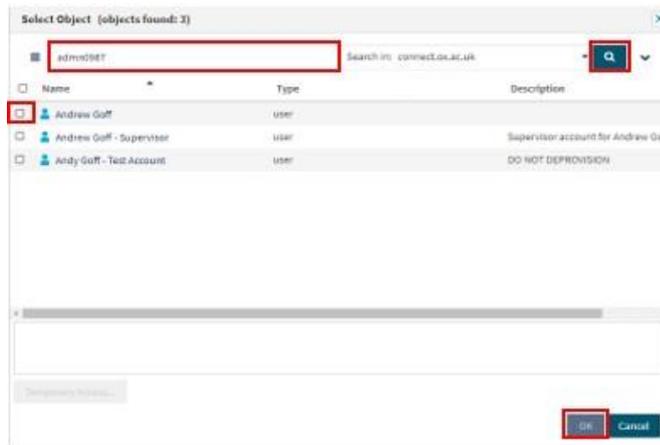
- Select the correct user by checking the box next to their name then click OK
- You will then be returned to the Resource page and you will see the added user in the members list.

Please note: If the user has RFS drive mapped before you added them to the group, they will need to remove the mapping and re-map again, ensuring they re-enter their CONNECT AD credentials. This is required for newly added permissions to take effect.

Change a user's permissions to read-only or Remove user access

You can change a user's access permissions from Read Only to Read Write (or vice versa) using RFS Self Service, or follow steps 1 to 5 to remove a user completely.
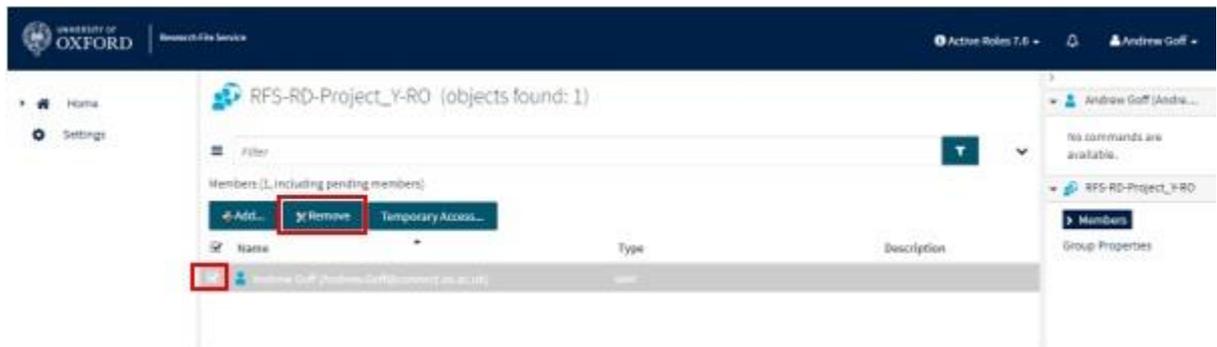
- Open a browser and navigate to https://self-service.rfs.ox.ac.uk (on University network, or with the University VPN active)
- You will be prompted to enter your CONNECT AD login details using the format **CONNECT\SSO**, click Sign In (may look different on Mac or Linux)

- Once you are on the home page, click on RFS Resource Management

- Allow the resources page to load then select the Resource Group your user is currently a member of (e.g. If you want your user is a member of the "Read Only" for "Project_Y", click on RFS-RD-Project_Y-RO)
- Select the user you want to remove by checking the box next to their name then click Remove. The user will disappear from the list and will no longer have access.


To grant the user new permissions, repeat the steps taken in the above section Give a new user access to your storage and add them to Read Write Group (e.g. RFS-RD-Project_Y-RW)
Any other method of setting permissions, outside of RFS self-service, will not work

View Quota Information

You can view your storage allocations quota usage in Active Roles Server.

- Open a browser and navigate to https://self-service.rfs.ox.ac.uk (on University network, or with the University VPN active)
- You will be prompted to enter your CONNECT AD login details using the format **CONNECT\SSO**, click Sign In (may look different on Mac or Linux)
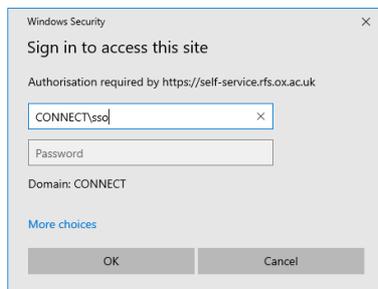
- Once you are on the home page, click on RFS Resource Management

- Allow the resources page to load then select the Resource Group you want to check. The quota information displayed will be the same for both the RW and RO groups for each project, so can be viewed on either.
- Allow the resource page to load then click on the **Group Properties** link

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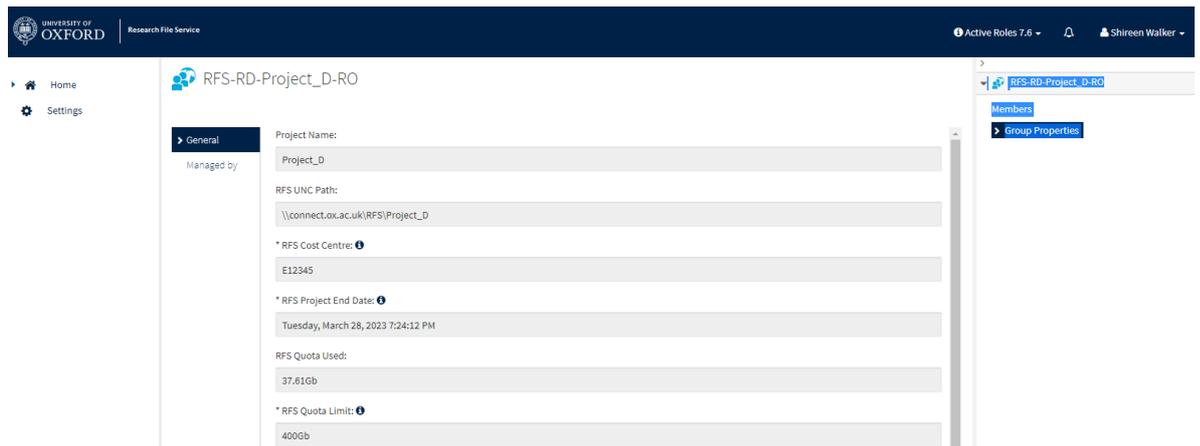
You will find the Project Name, project end date, Quota Used and Quota Limit fields in the Group Properties along with your storage network address (RFS UNC Path) and Cost Centre.
Any other method of viewing storage available may give a result at the incorrect level

Restoring files or folders from a previous version

It is possible to retrieve and restore previous versions of files or folders from a snapshot of your RFS projects taken at 09:00, 12:00 and 15:00 every weekday (not on Saturdays or Sundays). Snapshots are kept for around one week. When the storage area limit is reached, the oldest previous versions are deleted to make room for newer versions to be saved. After a version is deleted, it cannot be retrieved. Previous versions should not be considered a replacement for creating regular backups.

Windows users can restore files or folder themselves. Mac or Linux users should email rfs-help@it.ox.ac.uk, stating which date and time the restored file or folder is required from.
How to restore from Previous Versions (Windows users only)
Right click on the folder you want to restore from, then click **Properties**
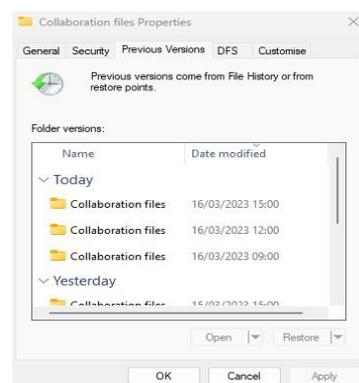
Click on the **Previous Versions** tab
Select the version you want to restore
Select **Open** to view the files. You can copy a single file from the Previous Versions window (which has a time stamp) and paste it into the current version of the same folder. If there is a file of the same name in that folder, this version will overwrite it
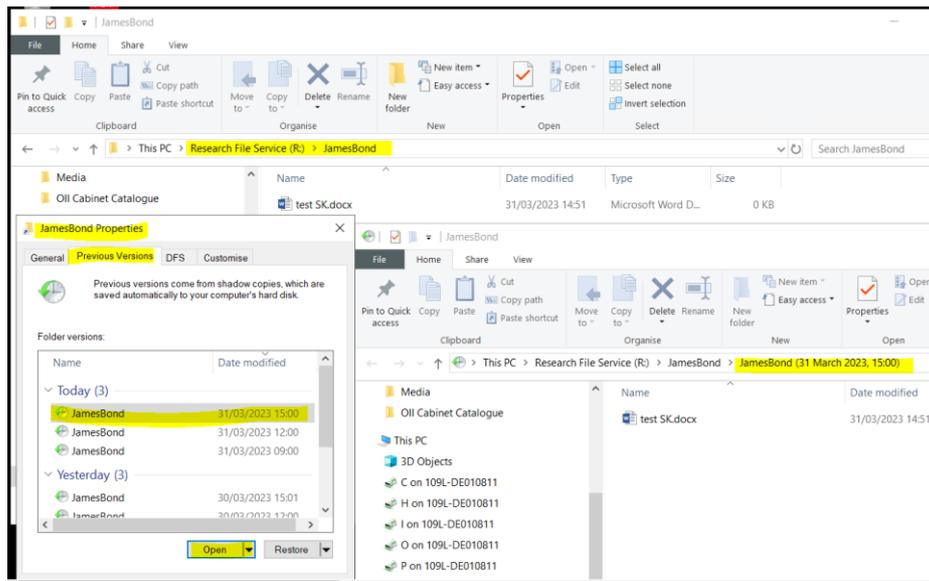
If you select the Restore option, it will overwrite ALL the existing data in the selected folder with the previous version.