

# Research File Service (RFS): Owner Guidance

This is a guide intended for users who already own, or plan to request, RFS project storage. In this document you will be shown how to:

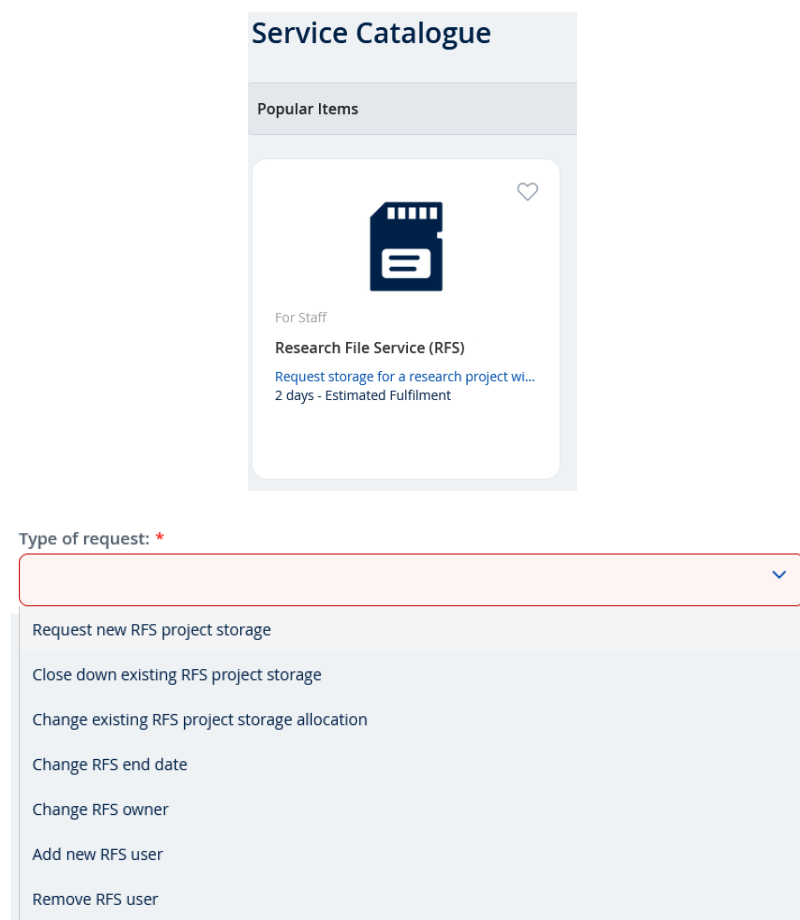
- Request RFS storage space
- Map RFS to your File Explorer on Windows or to the Finder on MacOS
- Add internal Oxford users to your storage space and assign them permissions
- Add external guests to your storage space and assign them permissions
- Restore files from previous versions

## Useful links:

- [RFS Self-Service Portal](#)
- [RFS File Management Portal](#)
- [OSM](#) – please search for 'RFS' to find the RFS Service Request
- [Reset CONNECT Password](#)
- [Oxford VPN Help](#)

## Requesting Research File Service storage

1. Visit the [OSM](#) and search for 'RFS'. Select the **Research File Service (RFS)** service request (shown below).



2. In the *Type of Request* dropdown (shown above), select *Request New RFS Project Storage*
3. Complete the form fields. You will be asked to provide:
  - A project name
  - Two owners (one of which should be the PI - we ask for two owners in case one leaves or is absent)
  - Department
  - Cost centre (for projects above 20TB)
  - ITSS name
  - Storage amount required. **Only request storage for the amount of data that you are in possession of. You can easily increase this allocation once you have more data, using the same service request on OSM**
  - Project end date
4. Click on *Review & Submit*
5. In the next 2-3 days, you will receive confirmation emails to confirm that your CONNECT account has been set up, as well as your RFS project storage being set up. Setting up your CONNECT account will require you to call the IT Service Desk: please carefully follow the instructions in the email you receive. **Please do not call the service desk to activate your CONNECT account if your University card has expired or will be expiring soon. Ensure that you have renewed it before you attempt to activate your account.**
6. Using your Single Sign On (SSO) as your username, visit <https://password.connect.ox.ac.uk> to set up a password, entering the passcode provided to you by the IT Service Desk during step 5.
7. Once active, your CONNECT account will give you access to RFS storage and [RFS self-service portal](#), to be able to apply user read-only or read/write access permissions.

### Resetting your CONNECT password

If you already have a CONNECT 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).

**If you have not accessed RFS for a while, you may see an error suggesting that your MyWorkDrive username or password has expired. Please reset your CONNECT account password first, before contacting RFS help**

### Connecting to RFS storage via the Oxford 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>.

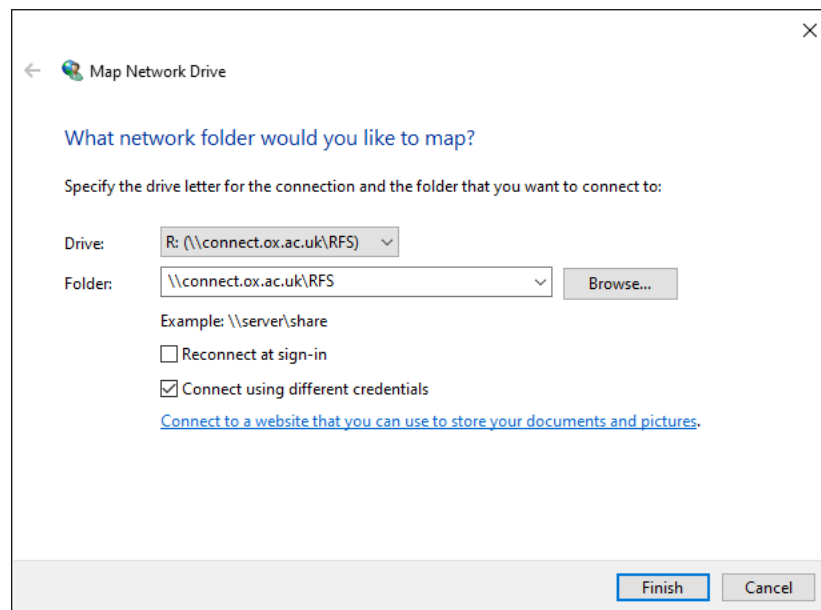
**Please note that you will still need to connect to the Oxford VPN if you are using eduroam as your network.**

### Mapping a drive to your RFS project

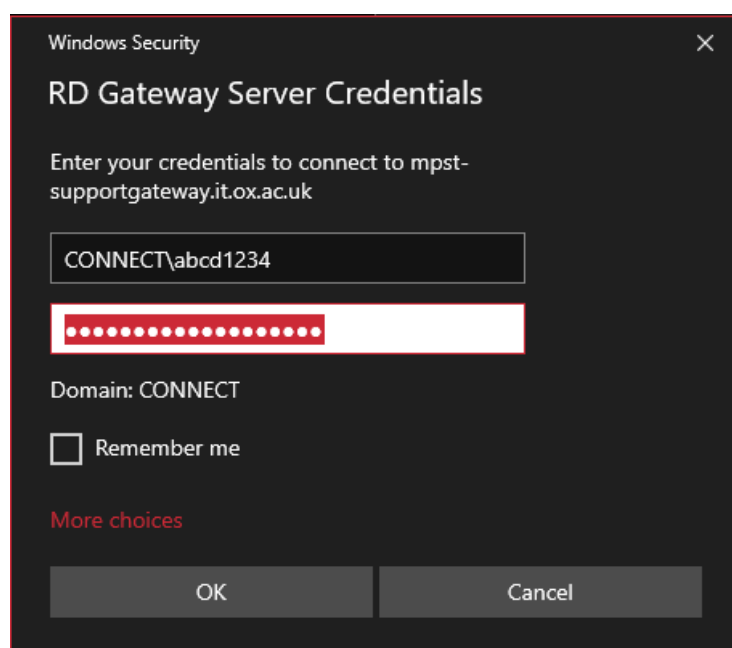
Instructions on how to map a CONNECT network drive for Windows, Mac and Linux clients can be found on the IT Services website <https://help.it.ox.ac.uk/map-connect-drives>

**You will need to use your CONNECT account for this mapping - enter Username as "CONNECT\SSO" and your CONNECT password. Additionally, you will need to be connected to the Oxford VPN if you are not connected to an official Oxford University network**

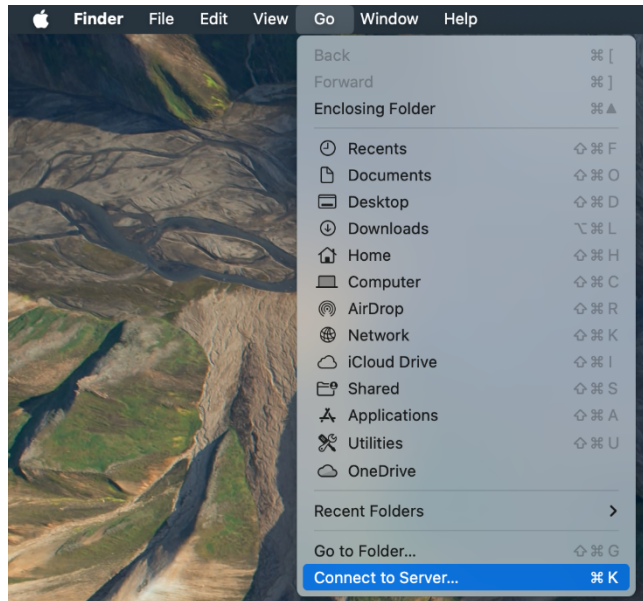
1. **On Windows**, to access your RFS project, head to 'This PC' the File Explorer and press *Map network drive*, found in the ribbon. In the *Folder* text box, enter \\connect.ox.ac.uk\RFS. RFS should be mapped to the R: drive if possible, as shown below. Tick *Connect using different credentials* and press *Finish*



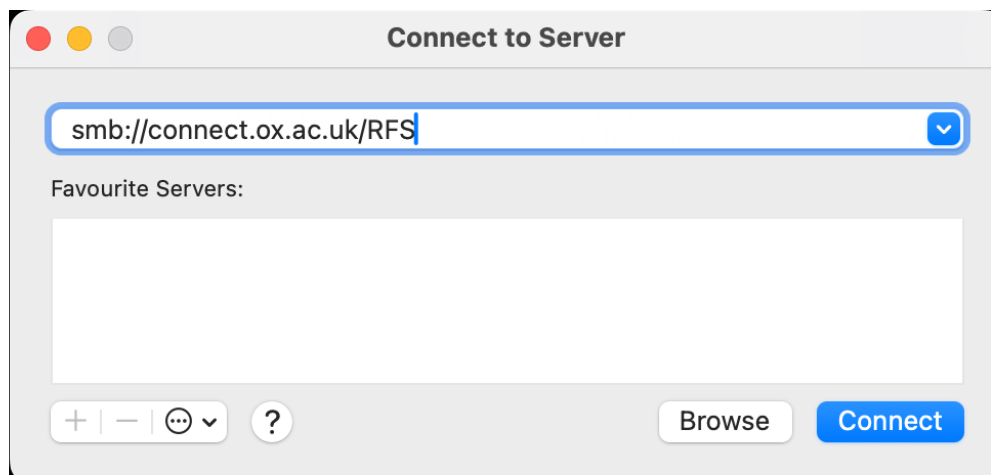
2. In the dialog box, enter *CONNECT\SSO* followed by your CONNECT password. Your SSO is your Oxford username (e.g. abcd1234). Enter the password you set up when you first created your CONNECT account. RFS in the File Explorer should open after this step.



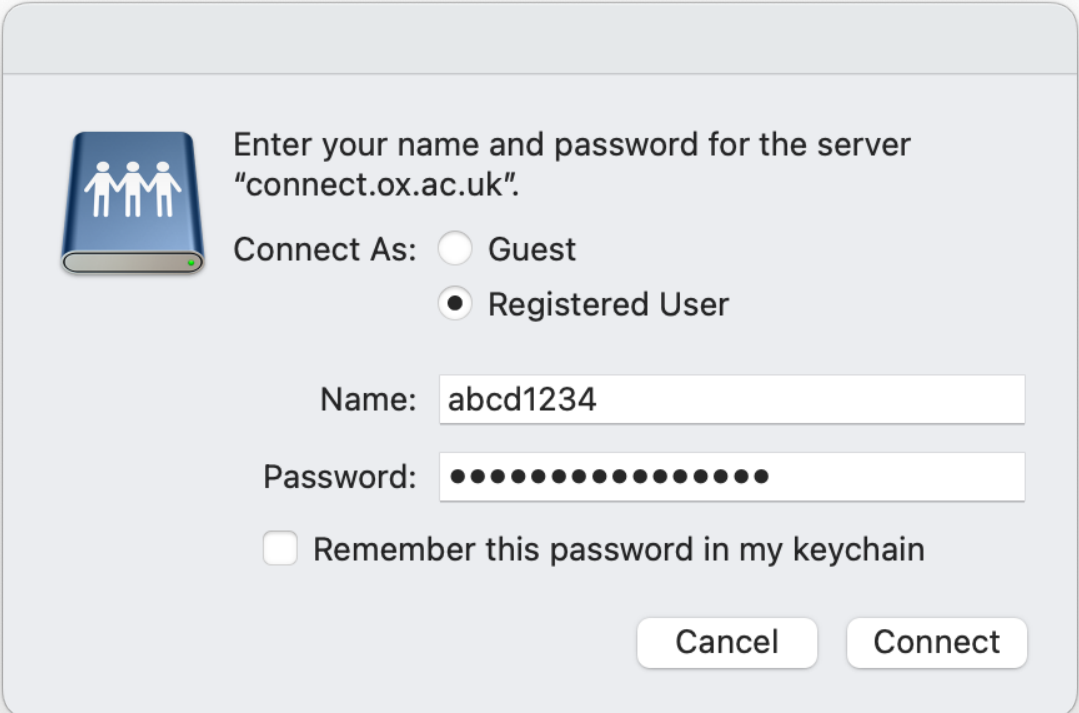
1. On MacOS, in the *Finder*, select *Go*. Click *Connect to server*



2. In the dialog box, enter `smb://connect.ox.ac.uk/RFS`



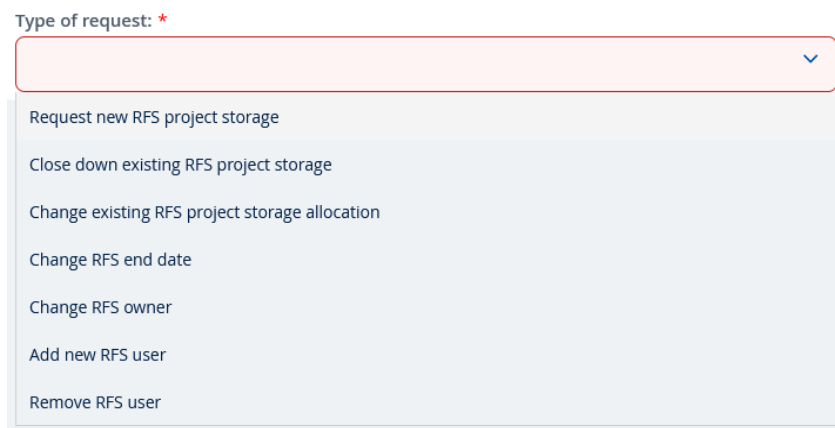
3. Enter your CONNECT credentials in the format shown below, when prompted. Your RFS project folder should now open.



### Adding users: Internal Oxford users

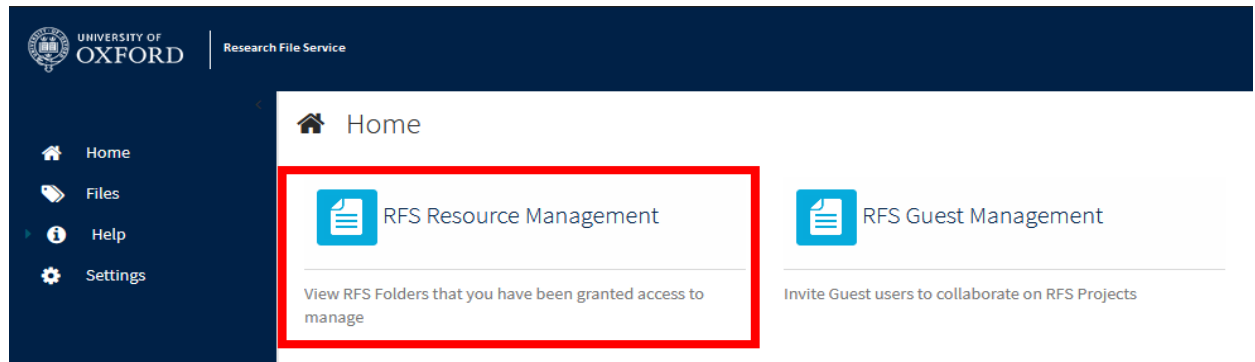
**Before requesting access to RFS storage, all internal users need a CONNECT account. Users can request this through the RFS service request on [OSM](#)**

1. Access the RFS service request in the OSM IT Self Service catalogue

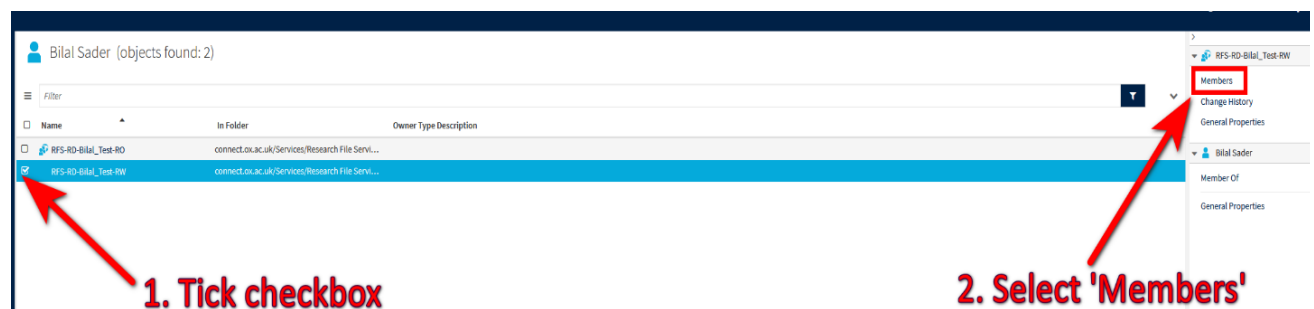


2. In the *Type of Request* dropdown (shown above), select *New RFS User*
3. Complete the form
4. Click on Review & Submit

5. Both the requester and new user will receive an email with the instructions on how to activate their CONNECT account. The new user will need to call the Service Desk on 01865 612345 for the passcode they will require whilst registering.
6. Once active, their CONNECT 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 access through the [RFS self service portal](#)**
7. In the RFS Self-Service Portal, select *RFS Resource Management*. This should list the **RW** (read/write) and **RO** (read-only) permission groups associated with all of your projects. RW permissions allow users to **upload, delete, and edit** files, whereas RO permissions only allow users to **view** files



8. Tick the checkbox next to the permission group you wish to add the user to. On the right hand side of the screen, a panel with some further options should appear. From here, select *Members*



9. On this page, you will see a list of users within this permission group. Press the **+Add** button, and a dialog box will appear.
10. Enter the SSO of the user you wish to add to your group. If they have a CONNECT account, they will appear in this list. Select the checkbox next to the user, and press OK
11. The user is now added to your project.

**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 also ensure that all access permissions are reviewed on at least an annual basis.

Additionally, 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.

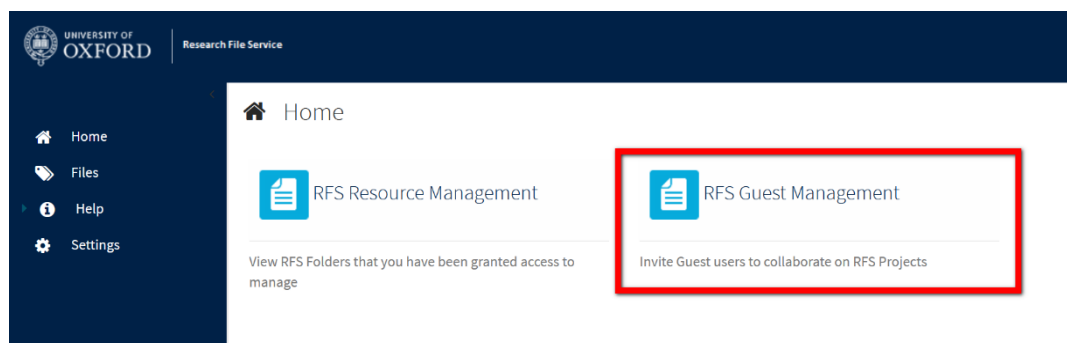
## Adding users: External guests (non-Oxford users)

Guidance:

- Owners must ensure that access is **only granted to external users** where necessary and revoked PROMPTLY when access is 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 [RFS Self-Service Portal](#). Ensure you are connected to the University network or have the Oxford VPN active.

1. Select *RFS Guest Management* on the Self-Service Portal 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. Click *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.

**New User**

New RFS Guest in External Guest Users

> New User

\* First name:

\* Last name:

\* Email Address:

Name:

\* Managed By:

Secondary Owners:

Name	E-Mail Address	University affiliations
Pen Test D	Pen.TestD@it.ox.ac.uk	

Account Expires:

☐ Open properties for this object when I click Finish

To complete, click Finish.

**Finish** **Cancel**

5. Once the guest account is set up, 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

UNIVERSITY OF OXFORD Research File Service

Active Roles 8.1

External Guest Users (objects found: 2)

Filter

Display Name	E-Mail Address	Manager	accountExpires
<input checked="" type="checkbox"/> Test Guest	testguest@mydomain.com	CN=Bilal Sader,OU=Users,OU=User Accounts,...	Wednesday, March 13, 2024

1

2

Member Of

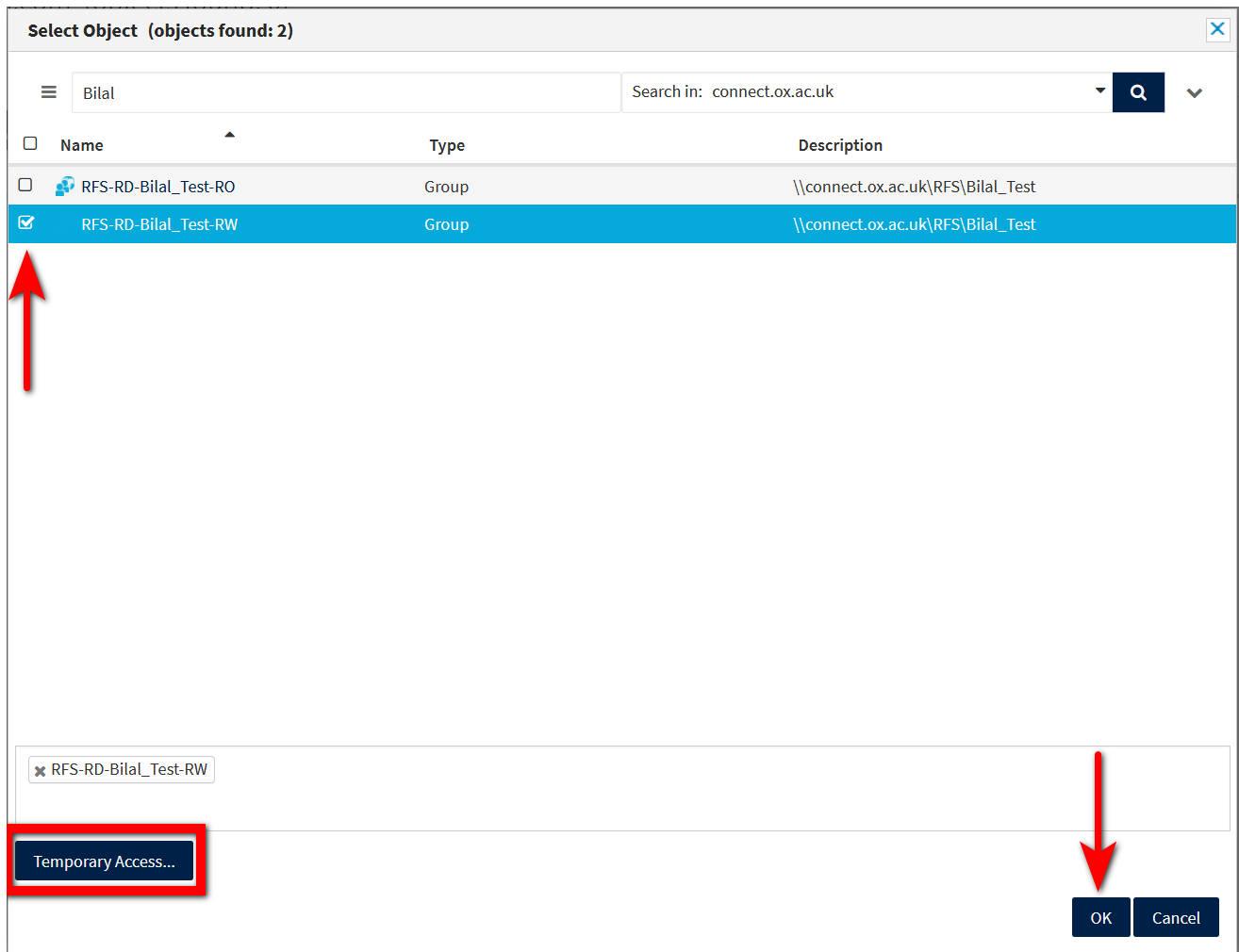
General Properties

External Guest Users

New RFS Guest

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 checkbox next to the project name to select it. If you wish to restrict access to the group to a fixed 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 can access files stored in RFS by visiting the [RFS File Management Portal](#) and signing in with their email and multi factor authentication, set up 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. Connect to the Oxford VPN if not on site
2. Visit the [RFS Self Service Portal](#) and log in using your CONNECT Account
3. Select *RFS Guest Management*
4. Select the guest you wish to resend the invite to by clicking once on their name
5. In the resulting pop-up, under the *RFS Guest Status* dropdown field, select the *Resend Invite* option
6. 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**'.

## View your RFS storage space quota

**Any other method of viewing storage available may give a result at the incorrect level. If Windows File Explorer shows you an incorrect storage quota, do not panic: please check your allocation using the steps below.**

You can view your storage allocations quota usage in the RFS Self-Service Portal.

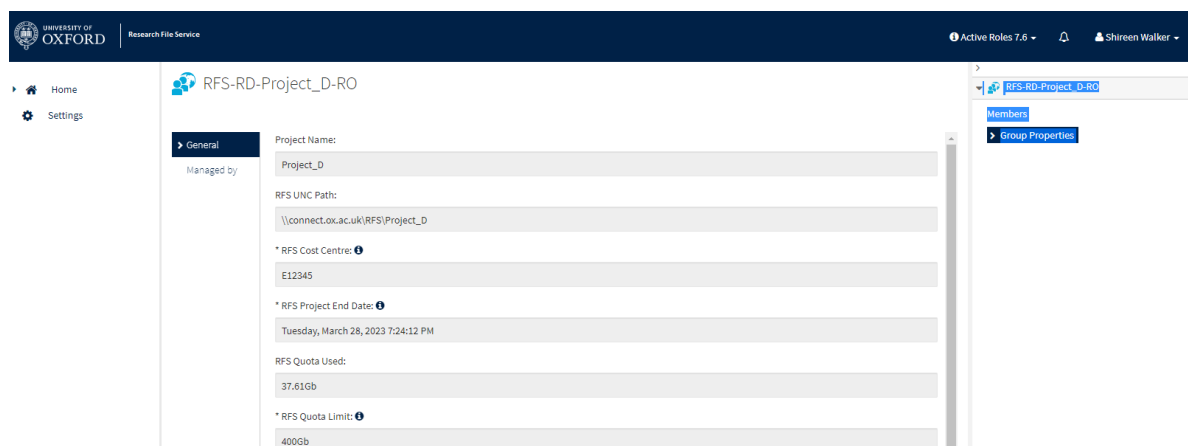
1. Open a browser and navigate to <https://self-service.rfs.ox.ac.uk> (on the University network, or with the University VPN active)
2. You will be prompted to enter your CONNECT login details using the format **CONNECT\SSO**. Click *Sign In* (may look different on Mac or Linux)



3. Once you are on the home page, click *RFS Resource Management*



4. 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.
5. Allow the resource page to load then click on the *Group Properties* link



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*.

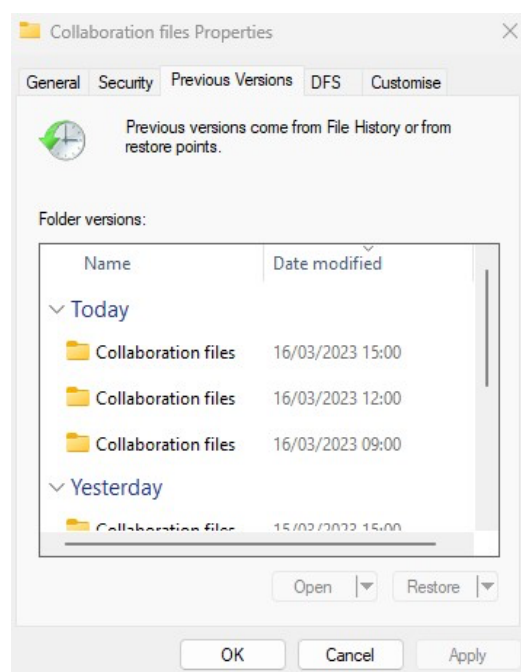
### Restoring files or folders from a previous version

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.

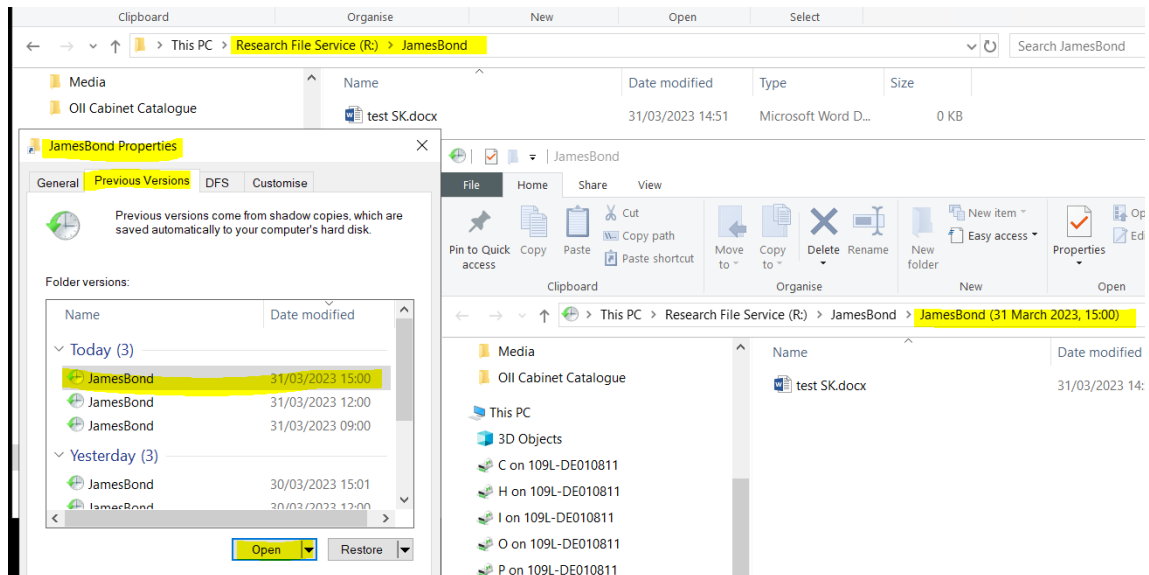
Windows users can restore files or folder themselves. Mac or Linux users should email [rfs-help@it.ox.ac.uk](mailto:rfs-help@it.ox.ac.uk), stating which date and time the restored file or folder is required from.

To restore files or folders using Windows Shadow Copies (previous versions):

1. On the File Explorer, right click on the folder you want to restore from, then click *Properties*
2. Click on the *Previous Versions* tab. A list of previous versions of this folder or file will appear.



3. Select the version you want to restore. If you are unsure which file version is the one you wish to restore to, click *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.

### Accessing files through the RFS File Management Portal

Besides SMB, RFS files can be accessed and managed through the [RFS File Management Portal](#). External guests will only be able to access RFS files through this space. You may use the RFS File Management Portal to upload new files, as well as organise and manage older files.