

Manual Research Drive

Setting up the project environment

Introduction

Research Drive allows you, as a research team, to store research data during your research and to work safely with the data. Research Drive is a cloud-based data storage service in which you can collaborate with other institutions, businesses, municipalities, or international partners.

The research team will have its own environment within Research Drive in which it can create its own folder structure, create user groups, distribute rights and invite users. The data owner is responsible for setting up this project environment. Below you will find more information to help the data owner get started.

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Access to Research Drive

The data owner must take the following steps to gain access to Research Drive and to set up the project environment:

1. A SurfSecureID is required for two-factor verification. During the Corona crisis, the user's identity cannot be checked and registered at the service desk. This is now done online. Without SurfSecureID you can neither apply nor gain access to Research Drive. You cannot gain access without SurfsecureID. ResearchIT can check if you already have a two-factor verification. If you already have it you do not need to take any action.
2. ResearchIT invites you to access Research Drive and you complete the activation. Select access through Surfconext if you have an internal account with the faculty. An external party can gain access through a local account.
3. ResearchIT will create the project folder after the account has been activated. We can only create the project folder and link it to your account after that.
4. You will see the folder when you log back into Research Drive. You are now able to invite other users and researchers.
5. You can also create a folder structure, create user groups and give others access.

Explanation and tips for setting up the project environment

We explain the roles within Research Drive, how to set up the folder structure, how to use groups and how to apply names that you can assign to your groups and folders.

What we explain:

- Strategy with users and groups
- Roles in Research Drive
- Invite users
- Creating a folder structure
- Creating groups
- Sharing folders
- Allocating rights

Strategy with users and groups

- Manage users in groups as far as possible.
- Designate a group in such a way that you recognise it in relation to the research project.
- Create a group (prefix)-everyone_r. The prefix is the name of the research project. The 'r' indicates that this group only has reading rights. Assign permissions to this everyone_r group in the highest possible folder in the folder tree.
- Give permissions to groups and not individual users.
- As a data owner, create a group and make sure you have someone who can be your backup. Specify a name here, for example: grp.groupadministration.projectname_rw and share the root folder with this group and then share all rights.



Roles in Research Drive

Contract owner and dashboard owner:

- ResearchIT (ICT Services), researchit@hva.nl / researchit@uva.nl

Data steward:

- Project manager
- Lead researcher

Users:

- Users with a login from the faculty
- Employees and students (limited)
- Users without a login from the faculty. They are given a local account.

Invite users

The data owner invites fellow researchers as follows:

1. In Research Drive, select the option **Menu > Dashboard** at the top left.
2. Select the option **Authorize > tabblad Gebruikersaccount (User Accounts tab) > Gebruiker uitnodigen (Invite a User)**.
3. Then fill in the **name** and **e-mail address**. You do this on the basis of an e-mail invitation.
4. The fellow researcher will then receive an e-mail with the invitation.
 - a. If a fellow researcher also has an HvA-ID or UvAnetID, the activation will take place through Surfconext.
 - b. If the fellow researcher is external, a local account is created. This person receives two e-mails. The first e-mail is the invitation and the second e-mail contains a temporary password. It is recommended to change this password immediately.

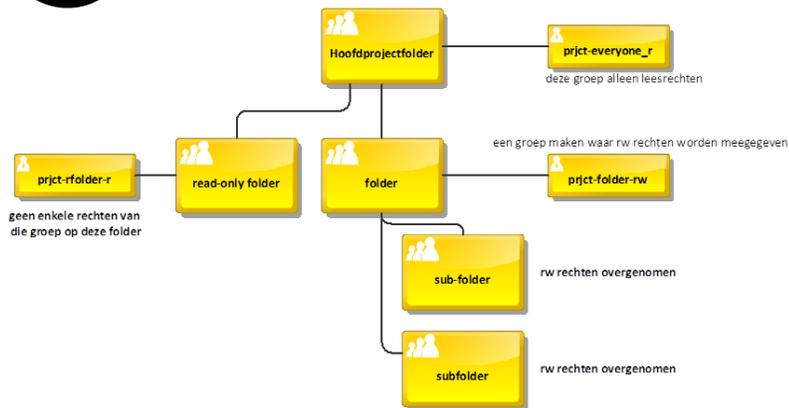
Note: if the invitation is not accepted within 7 days, a reminder e-mail will be sent. This will be repeated a total of three times. After that, the invitation expires.

Creating a folder structure

- Use clear names for the folders with codes or abbreviations, including the subfolders!
- Create groups per project folder, and use the same codes and abbreviations.
- Folders higher up in the hierarchy in principle determine the rights for subfolders. However, these rights can be changed through 'share'.

An example of a folder structure with names has been given on the following page.

Met opmerkingen [DvH1]: Hier stonden eerst de contactgegevens van Nasser en René.



Creating groups

First create a group before you can share a folder or file. It is also easier to grant permissions through groups.

1. Go to **Instellingen (Settings)** in the upper right corner to create a group. Now click on **Aangepaste groepen (Custom groups)**.
2. Click on **Groep maken (Create a group)** and choose a name for your group. In this example, the name of my group is 'grp-codex researchers'.
3. Now add the users.
4. Exit, now select the option **Bestanden (files)** in the dashboard.
5. Choose the folder you want to share with this group, and specify the appropriate permissions.
Tip: if you create folders that can only be read by specific groups, you can make this clear through the name of the groups. For example: 'grp-researchers-r', where the 'r' stands for 'read'.

Tip: To provide a backup within Research Drive, the data owner (data steward in Research Drive) can add a second person as group owner in each group that is created.

Sharing folders and files

The following options are available for sharing folders and files:

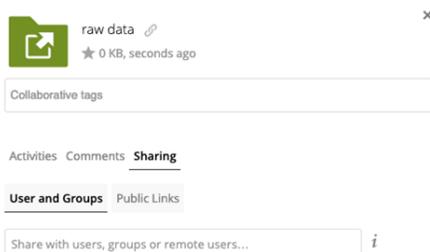
1. Through the web environment for:
 - a. users with an internal University account
 - b. users with a local account and password (externals)
2. Through a public link for:
 - a. external users without an account
3. Through Federated Sharing from the Surfdrive environment or from another Research Drive environment for:
 - a. other Research Drive users



1. Share through the web environment

You can share files and folders with other Research Drive users. These are users who have their own login account for Research Drive. This can be a University account, but also an external one with a local account.

1. Click on the **delen (share) icon** ('gear') behind the file or folder to start sharing a file.
2. The following screen will then appear on the right:



3. Now search for a user or group by typing the first letters of the name.

Note: Consider how the name can be helpful. All users and groups that start with these letters are shown in one overview. The group names can for instance start with the project code.
4. Select the user or group you want to share with by clicking on that user or group.

Note! If a user is not found, you can also enter an e-mail address to invite someone as a guest (see also: how to share with guests).
5. If the person you want to share with does not yet have a Research Drive account, you must first invite them through the Research Drive Dashboard.
6. You will now have a number of options to share: **kan delen (can share) / kan bewerken (can edit)**. Under the option **kan bewerken (can edit)**, click on the arrow for more detailed options: **aanmaken (create) / wijzigen (edit) / verwijderen (delete)**.

Make sure that you do not check the **delen (share)** option to share the folder with others through Research Drive. Now click on **aanmelden via e-mail (sign up by e-mail)** and the other user will receive a notification that a folder has been shared.

7. You can also delete the shared folder by clicking on the recycle bin.



2. Sharing through Public link

You can create a public link when you want to share a folder without requiring an account. You can invite people by e-mail and then share the content of a folder or only a file. Someone who receives this URL by e-mail will be able to open the file or folder. You can also set a password and expiration date for the link.

- a. Select the corresponding file/folder.
- b. Now select the **delen (share)** icon, and click on **delen (share)**.
- c. Now select **Public Links**, after which the following window appears:

- d. The following options are available for a 'Public Link':
 - a. **Download / View:** The recipient of the link can only view and download folders and files.
 - b. **Download / View / Upload:** The recipient of the link can view, download and upload folders and files to a folder.
 - c. **Upload only (file drop):** The recipient of the link cannot see the contents of a folder, but can upload a new file.
 - d. **Password:** If you set a password here, you can only gain access if you know the password. The password will be sent separately to the recipients in another e-mail.
 - e. **Expiration date:** If you set an expiration date, the link expires after this date. Access will then no longer be possible.
- e. Give a suitable name, e.g.: 'Raw-data' for students.

3. Share with other Research Drive or SURFdrive users

a. Federated Sharing from the SURFdrive environment

If you have already started the research project and you already have data on SURFdrive, you can add a SURFdrive folder to your Research Drive through Federated Sharing. Federated Sharing allows you to share folders in a different storage system (SURFdrive) under the same identity, specifically your SURFconext identity.

You require your Federated Cloud ID for this. The instructions below explain how to do this after logging on in Research Drive.

1. Look up the Federated Cloud ID in Research Drive. Click on **Instellingen (Settings)** to display the main menu.



2. Click on **Algemeen (General)**. Scroll down until you see **Gefedereerde Cloud (Federated Cloud)**.
3. Copy this federated Cloud ID:
 - a. For the HvA: yourname@hva.data.surfsara.nl.
 - b. For the UvA: yourname@uva.data.surfsara.nl.
4. Now navigate to SURFdrive through the web interface <https://surfdrive.surf.nl/files>. Select the folder you want to see in Research Drive. Mark the folder by activating the checkbox.
5. Click on the **Delen (Share)** icon and enter the federated Cloud ID.

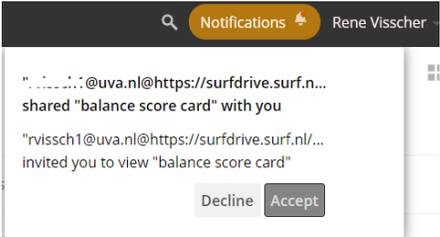


6. Your federated name will now be identified. After you have been identified, you can set the corresponding permissions. In this case, you can activate all the checkboxes.



Now you can close the SURFdrive environment.

7. Go back to Research Drive, click the **bel (bell)** icon.



Click on **Accept**.

8. The folder appears now in Research Drive.



b. Federated Sharing from the Research Drive environment

Sharing a SURFdrive folder is identical to sharing a folder with an external user from another faculty that also has Research Drive.

1. Request the federated cloud ID of an external user who wants access to your data.
2. Use the ID of this remote user in the same way as a normal user that a folder is shared with. Go to the corresponding folder, select the **deel (share)** icon, then select **Deel met een Federated Cloud ID (Share with a Federated Cloud ID)**, and add the federated sharing ID of the external user.
3. The external user receives a notification that a folder or file has been shared and must accept this (through notifications) before the shared folder becomes visible.

Sharing folders for anonymously dropping files (Drop zone)

This is a folder in which only people who have received the URL based on a specific e-mail are able to upload files.

How to do this:

1. Go to the corresponding folder and select the **delen (share)** icon.
2. In the right window you select the option **Openbare Links (Public Links)**.
3. Click on **Creëer openbare link (Create a Public Link)** and the following window will appear:

Creëren link om te delen: /testfolderzonderspatie

Naam link
Openbare Link

Download / Bekijk
Ontvangers kunnen de inhoud bekijken of downloaden.

Download / Bekijk / Upload
Recipients can view, download and upload contents.

Download / View / Edit
Ontvangers kunnen de inhoud bekijken, downloaden, bewerken, verwijderen en uploaden.

Alleen uploaden (File Drop)
Ontvang bestanden van meerdere ontvangers zonder de inhoud van de map te weergeven.

Wachtwoord
Kies een wachtwoord

Vervaltermijn
Kies een vervaldatum

Versturen link via e-mail

Delen

4. Select the option **Alleen uploaden (Upload only) (File Drop)**.
5. If required, add a password and an expiration date.
6. The password must then be entered separately through another method.
7. Finally, enter the e-mail address of the person you want to allow to upload files.



Explanation of types of rights

- Rights are used to limit or allow access to files or folders.
- Rights are inherited from the higher folders, unless that is changed through sharing.
- Applicable to users and groups that have been granted access.

Right	Description
Can share	User or group can also share a shared folder
Can edit	User or group can change the file within the folder
Create	User or group can create new files and add them to a folder
Edit	User or group can upload files and replace existing files. Can also rename a folder
Delete	User or group can delete existing files in a folder (moved to the recycle bin)

Tip: turn off sharing of 'shares'!