

USER INSTRUCTION SHEET

Manage Projects

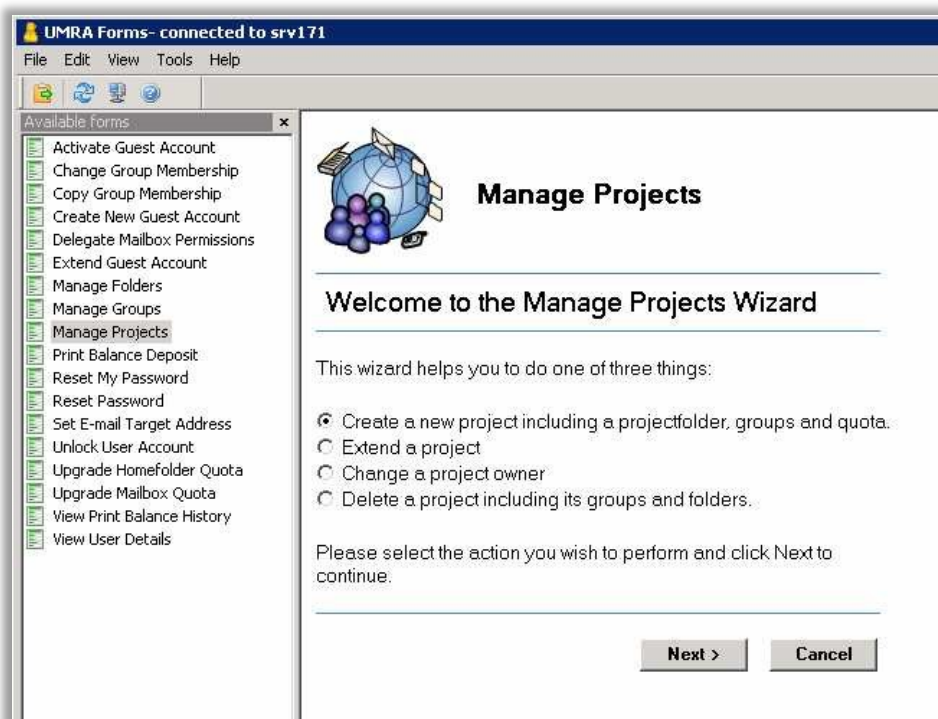
This manual provides instructions on how to create a new project, extend a project or delete a project using the UMRA Form **Manage Projects**. The function is only available for WPS employees.

Start the **UMRA Forms** application by double clicking the shortcut on your desktop.



In the left pane you'll find all the Forms that are available to you.

Click on **Manage Project** to load the form.



Select the action you would like to do: create a project, extend the lifetime of a project, change the owner of a project or delete a project. To be able to change the owner or delete a project you'll have to be a member of the Project-GroupAdmins group. Click on the **Next** button to continue.

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Create a new project



Manage Projects

Enter project information

Enter the required information about the new project.

Name:

Description:

Expire month: 5

Expire year: 2009

Click Next to continue.

Enter the desired project name and description, both are mandatory fields.

Note: The name of the project can be no longer than 43 characters and must be unique.

By default the expire date for the project is set to one year ahead. You can adjust the expire month and year by clicking on the **+** or **-** buttons. The expire year can be set as far as 10 years in the future.

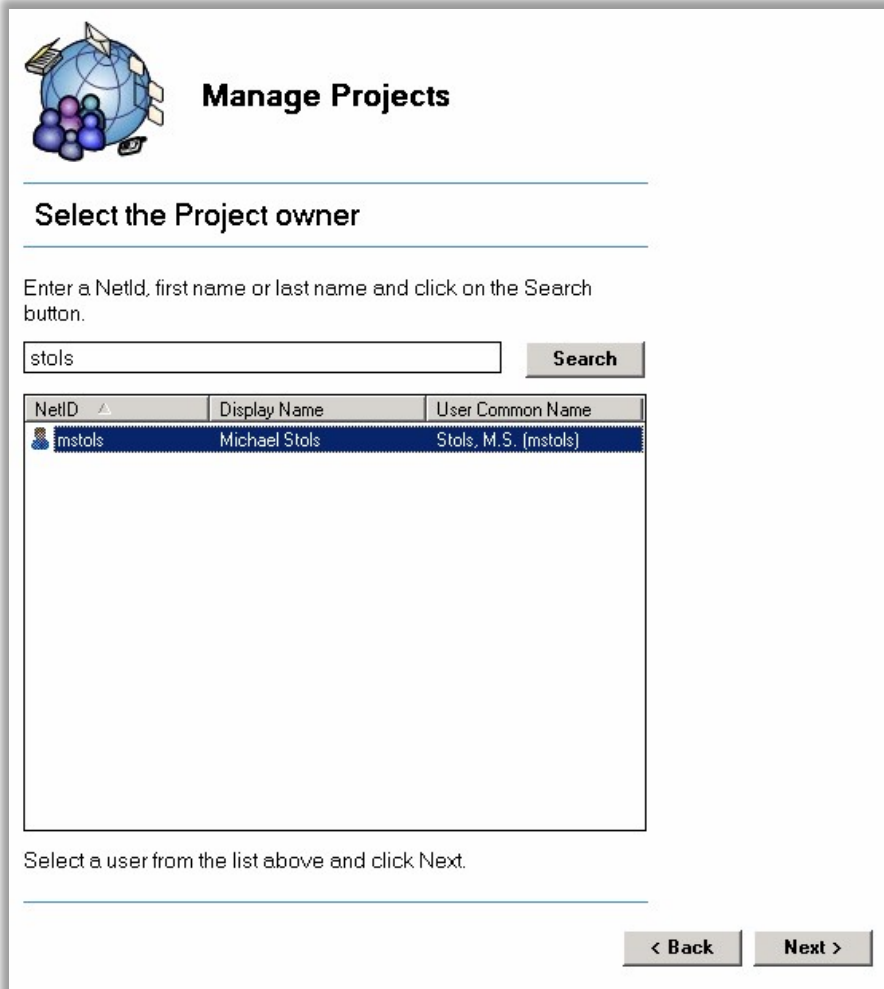
The project expire date can be used by administrators to check whether a project folder can possibly be removed. Of course this will only be done upon agreement with the project owner.

Click on the **Next** button to continue.

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Every project needs to have an owner who can be contacted about the project.




The screenshot shows a web interface titled "Manage Projects" with a globe icon. Below the title is a section "Select the Project owner" with instructions: "Enter a NetId, first name or last name and click on the Search button." A text input field contains "stols" and a "Search" button is next to it. Below the input is a table with three columns: "NetID", "Display Name", and "User Common Name". The table contains one row with a user icon, "mstols", "Michael Stols", and "Stols, M.S. (mstols)". Below the table is the instruction "Select a user from the list above and click Next." and two buttons: "< Back" and "Next >".

Manage Projects

Select the Project owner

Enter a NetId, first name or last name and click on the Search button.

Search

NetID	Display Name	User Common Name
 mstols	Michael Stols	Stols, M.S. (mstols)


Select a user from the list above and click Next.

< Back **Next >**

Type the owner's first name, last name or NetId and click the **Search** button.
Select the required user account from the results list and click the **Next** button.

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Manage Projects

Enter project owner information

Enter information about the user that owns the project.

NetId: mstols

Display name: Michael Stols

e-mail:

Phonenumber:

Click Next to continue.

Enter the owner's phone number and click **Next** to continue.

Note: The owner's e-mail address can be changed if needed. This information, as well as the owner's phone number, can be used by administrators to refer to in case a project has expired.

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Manage Projects

Select the preferred storage location

Please select standard or high available storage.

Standard storage has the following characteristics:

- Size can be in the order of multiple terabytes per project.
- Every night the data will be backed up and this back-up will be stored for two weeks. This means that a maximum of one day's data can be lost.
- Single location, no replication. The data is no longer available after loss of a single site/ datacenter and may need to be recovered from backup.
- The data can be accessed through CIFS and NFS (with kerberos authentication).

High available storage has the following characteristics:

- Size of project storage is limited to one terabyte per project.
- Every night the data will be backed up and this back-up will be stored for two weeks. After two weeks the data is backed up every week for a period of a year. This means that a maximum of one day's data can be lost and a restore can be requested a year from the date the data was deleted.
- Replicated over multiple sites / datacenters. The data is still available after loss of a single site/ datacenter.
- The data can be accessed through CIFS and NFS (with kerberos authentication).

- ☒ Standard storage
☐ High available storage

Click Next to continue.

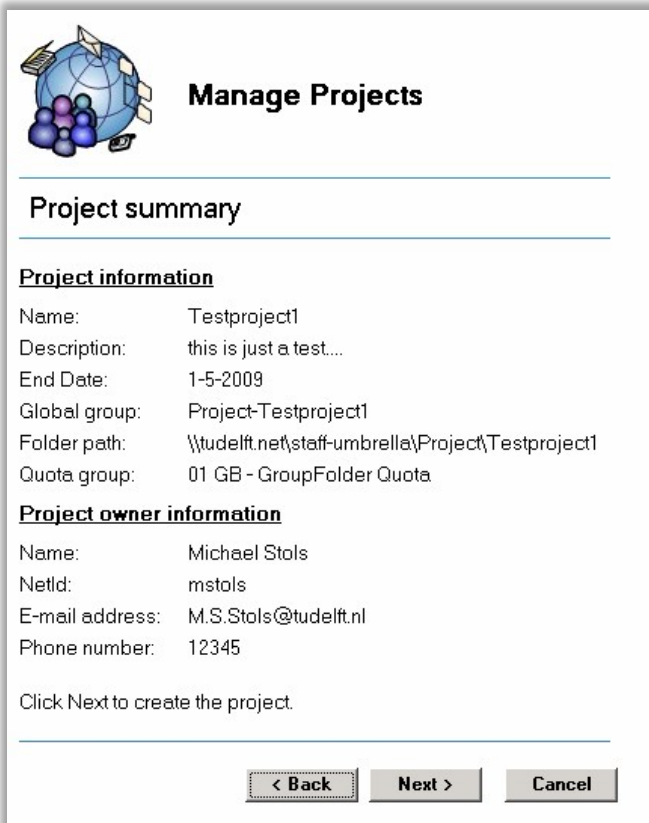
< Back

Next >

Select the preferred storage location and click Next.

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The image shows a screenshot of a 'Manage Projects' dialog box. It has a title bar with a globe icon and the text 'Manage Projects'. Below the title bar is a section titled 'Project summary'. Under this, there are two sub-sections: 'Project information' and 'Project owner information'. The 'Project information' section contains fields for Name, Description, End Date, Global group, Folder path, and Quota group. The 'Project owner information' section contains fields for Name, NetId, E-mail address, and Phone number. At the bottom of the dialog box, there are three buttons: '< Back', 'Next >', and 'Cancel'. Below the buttons, there is a line of text that says 'Click Next to create the project.'

Manage Projects

Project summary

Project information

Name: Testproject1
Description: this is just a test...
End Date: 1-5-2009
Global group: Project-Testproject1
Folder path: \\tudelft.net\staff-umbrella\Project\Testproject1
Quota group: 01 GB - GroupFolder Quota

Project owner information

Name: Michael Stols
NetId: mstols
E-mail address: M.S.Stols@tudelft.nl
Phone number: 12345

Click Next to create the project.

< Back Next > Cancel

The Project summary gives an overview of all chosen settings. You can click **Back** to return and adjust the project settings.

Click on the **Next** button to create the new project.

Note: The creation of a project comprehends:

Creation of a project group named **Project-*<ProjectName>***.

Creation of project subgroups **..-Contributors**, **..-Readers**, **..-Owner** and **..-GroupAdmins**.

Creation of a project folder named *<ProjectName>* on the project share, for Windows users a driveletter **U:** will be connected to the project share if they are member of the **Project** group.

The project owner will become a member of the **Owner** and **GroupAdmins** group, thus enabling the owner to add or remove members to the project subgroups and being registered as the owner of the project. The project owner will be able to read and write data to the project folder by default.

All project subgroups are added to the group **Project-*<ProjectName>***, this group is member of the group named **Project** which covers all other project groups.

By default the group **Project-*<ProjectName>*** is added to the quota group **01 GB - GroupFolder Quota**, meaning that the default quota for a project folder will be set to 1 Gbyte.

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Manage Projects



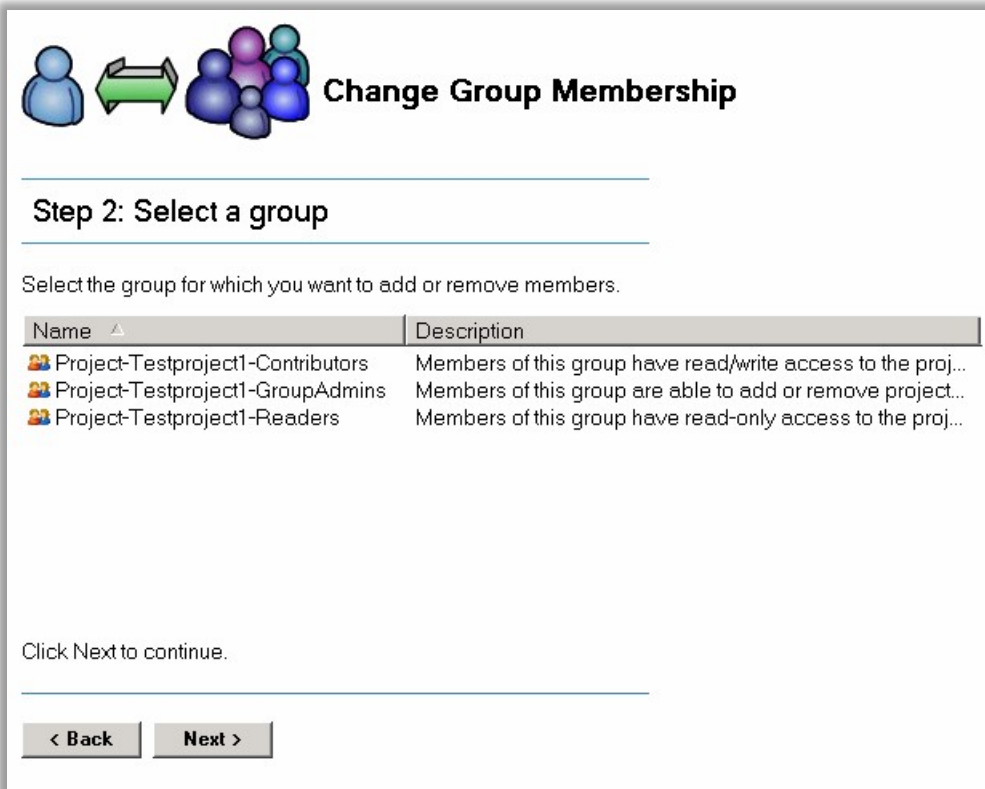
Click the **Next** button to continue to add members to the project subgroups or click the **Finish** button to exit the wizard.

Note: By default only the project owner is added to the subgroups **..-Owner** and **..-GroupAdmins** after the new project has been created. From this point on the project owner is able to add or remove members to a project by using the UMRA Form **Change Group Membership**.

If the **Next** button is clicked the **Change Group Membership** wizard will start:

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The screenshot shows a web interface titled "Change Group Membership". At the top, there is an icon of a person and a group of people with a double-headed arrow between them. Below the title, the interface is divided into sections. The first section is "Step 2: Select a group", followed by the instruction "Select the group for which you want to add or remove members." Below this is a table with two columns: "Name" and "Description". The table lists three groups: "Project-Testproject1-Contributors", "Project-Testproject1-GroupAdmins", and "Project-Testproject1-Readers". At the bottom, there is a prompt "Click Next to continue." and two buttons: "< Back" and "Next >".

Change Group Membership

Step 2: Select a group

Select the group for which you want to add or remove members.

Name	Description
Project-Testproject1-Contributors	Members of this group have read/write access to the proj...
Project-Testproject1-GroupAdmins	Members of this group are able to add or remove project...
Project-Testproject1-Readers	Members of this group have read-only access to the proj...

Click Next to continue.

< Back Next >

The project groups have already been selected. Members can be added or removed from the groups. For more information the documentation of the Change Group membership can be used.

Extend a project

Every project has an expiry date. The expiry date is used for administrative purposes only. Projects will remain accessible after the expiry date has expired. The project expire date can be used by administrators to check whether a project folder can possibly be removed. Of course this will only be done upon agreement with the project owner. Wherever mentioned, the project end date is the same as the expiry date.

If a project has a longer lifetime than anticipated when the project was created 'Extend a project' can be used. Select it from the main screen and press **Next** :

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Manage Projects

Welcome to the Manage Projects Wizard


This wizard helps you to do one of three things:

- ☐ Create a new project including a project folder, groups and quota.
- ☒ Extend a project
- ☐ Delete a project including its groups and folders.

Please select the action you wish to perform and click Next to continue.

A project can be searched and selected.

Tip: an empty search field will show all projects



Manage Projects

Enter a project name to extend

Enter (part of) a project name and click on the Search button.


Project	Description	End Date
Project-BT_Biotour_2008	BT-AID reis organisatoren	1-12-2008
Project-BT_Eventure	Project voor het gebruik van Congres-systeem ...	1-10-2008
Project-COPS2007	Stofdeeltjes onderzoek	1-9-2008
Project-DDI	Folder voor samenwerking tussen Delt Design ...	1-7-2014
Project-HTS	HTS uitwisseling protocollen / schoonmaakroo...	1-12-2008
Project-Kenia	Project Kenia	1-9-2008
Project-LinuxBO	Project Linux BackOffice	1-10-2007
Project-Linuxtest	test folder voor linux implementatie	1-12-2008
Project-NieuwProjectJac...	Blabrdstasdf	1-9-2008
Project-OMEnergyShare	uitwisseling groepen OM en Energy	1-12-2014
Project-Testproject1	this is just a test...	1-5-2009
Project-TNW_Test voor...	een beschrijving	1-8-2008
Project-TNW_WPS	Project voor testdoeleinden voor TNW-WPS	1-7-2008

Select a project from the list above and click Next.

Select a project and click **Next**

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Manage Projects

Enter project information

Enter the required information about the new project.

Name: Project-Testproject1


Description: this is just a test...

Expire month: 5

Expire year: 2009

Click Next to set the new expiry date of the project.

The current expiry month and year are given and can be adjusted using the + and – buttons. Select the new end date and click **Next**



Manage Projects

Results

Expiry date of this project has been set from 1-5-2009 to 1-4-2010

Click Finish to close the window.


A summary is shown with the old and new project expiry date. The expiry date is stored in active directory.

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Change the owner of a project

The owner of a project is the person to contact about the project. He or she is also a member of the GroupAdmins group of the project and therefore able to add or remove members to the project groups. If a project gets a different owner, this function can be used.



Manage Projects

Welcome to the Manage Projects Wizard

This wizard helps you to do one of three things:

- ☐ Create a new project including a projectfolder, groups and quota.
- ☐ Extend a project
- ☒ **Change a project owner**
- ☐ Delete a project including its groups and folders.

Please select the action you wish to perform and click Next to continue.

Next > **Cancel**

Choose 'Change a project owner' and click **Next**

You have to be a member of project-GroupAdmins to be able to use this function. If not, you'll see this screen:



Manage Projects

Warning

You have to be a member of the Project-GroupAdmins group to be able to perform this action.

Click Close to exit the wizard.

Close

If all is well, this screen will be shown:

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Manage Projects



Manage Projects

Enter the project name

Search

Enter (part of) a project name and click on the Search button.

Project	Description	End Date
Project-BT_Biotour_2008	BT-AIO reis organisatoren	1-12-2008
Project-BT_Eventure	Project voor het gebruik van Congres-systeem ...	1-10-2008
Project-COPS2007	Stofdeeltjes onderzoek	1-9-2008
Project-DDI	Folder voor samenwerking tussen Delft Design ...	1-7-2014
Project-HTS	HTS uitwisseling protocollen / schoonmaakroo...	1-12-2008
Project-Kenia	Project Kenia	1-9-2008
Project-LinuxBO	Project Linux BackOffice	1-10-2007
Project-Linuxtest	test folder voor linux implementatie	1-12-2008
Project-LR_FotoFilmArc...	Beeld en geluidsmateriaal t.b.v. de faculteit L&R	1-1-2018
Project-NieuwProjectJac...	Blabndsfasdf	1-9-2008
Project-OMEnergyShare	uitwisseling groepen OM en Energy	1-12-2014
Project-TNW_wPS	Project voor testdoeleinden voor TNW-wPS	1-9-2008

Select a project from the list above and click Next.


< Back

Next >

Choose the project and click **Next**

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Manage Projects



Manage Projects

Select the new project owner

Enter a NetId, first name or last name and click on the Search button.


NetID	Display Name	User Common Name
mstols	Michael Stols	Stols, M.S. (mstols)

Select a user from the list above and click Next.

Type the NetId of name of the new owner end click **Search**.
Select the new owner and click **Next**.

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Manage Projects

Enter new project owner information

Enter information about the user that owns the project.

NetId: mstols

Display name: Michael Stols

e-mail:

Phonenumber:

Click Next to continue.

As with create a new project, the owners phone number has to be entered and the e-mail address can be modified if necessary. Click **Next**.

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Manage Projects

Summary

Project information

Name: Project-TNW_WPS
Description: Project voor testdoeleinden voor TNW-WPS
End Date: 1-9-2008

Old project owner information

Name: Koen Mulderij
NetId: kmulderij
E-mail address: K.W.Mulderij@tudelft.nl
Phone number: 06-00000000

New project owner information

Name: Michael Stols
NetId: mstols
E-mail address: M.S.Stols@tudelft.nl
Phone number: 88888

Click Next to change the owner of this project.
The old owner will also be removed from the
GroupAdmins group of the project.

< Back

Next >

Cancel

This is a summary screen to check all information before the owner is changed. The old owner will no longer be a member of the GroupAdmin group and therefore loses the rights to add or remove members from the project groups. If the information shown is correct, Click **Next**.

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Delete a project

When a project is no longer necessary, it can be deleted. The project folder will be erased *including all files, folders and subfolders*. All related active directory groups will also be deleted.

Always check with the project owner before deleting a project !

To delete a project, select the option in the manage projects opening form:




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Select the delete option and click **Next**.

Enter a part of the project name (or leave the field empty) and click on Search



Manage Projects

Enter a project name to delete

Enter (part of) a project name and click on the Search button.

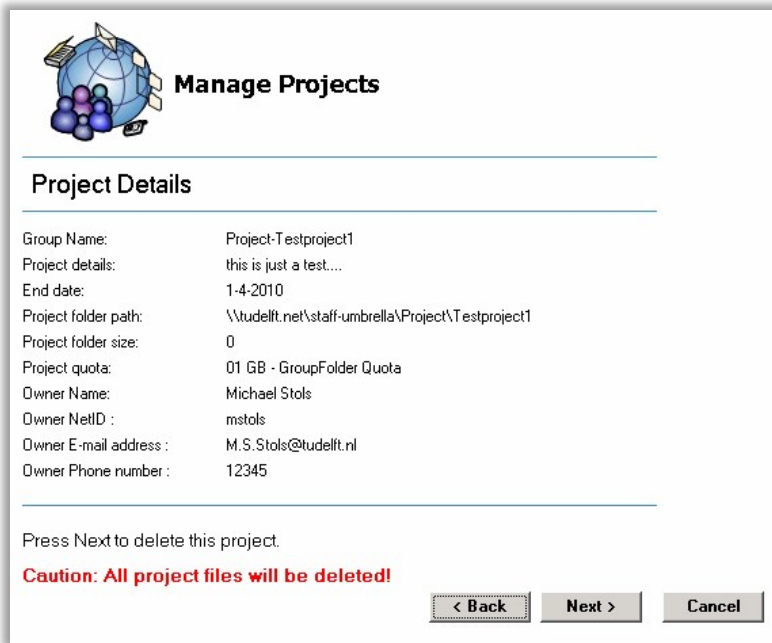
Project	Description	End Date
Project-BT_Biotour_2008	BT-AIO reis organisatoren	1-12-2008
Project-BT_Eventure	Project voor het gebruik van Congres-systeem ...	1-10-2008
Project-CDPS2007	Stofdeeltjes onderzoek	1-9-2008
Project-DDI	Folder voor samenwerking tussen Delft Design ...	1-7-2014
Project-HTS	HTS uitwisseling protocollen / schoonmaakroo...	1-12-2008
Project-Kenia	Project Kenia	1-9-2008
Project-LinuxBO	Project Linux BackOffice	1-10-2007
Project-Linuxtest	test folder voor linux implementatie	1-12-2008
Project-NieuwProjectJac...	Blabndsfasdf	1-9-2008
Project-OMEnergyShare	uitwisseling groepen OM en Energy	1-12-2014
Project-Testproject1	this is just a test....	1-4-2010
Project-TNW_WPS	Project voor testdoeleinden voor TNW-WPS	1-7-2008

Select a project from the list above and click Next.

Select the project you would like to delete and click **Next**

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The screenshot shows a window titled "Manage Projects" with a globe icon. Below the title bar is a section labeled "Project Details" containing a list of project information. At the bottom, there is a message "Press Next to delete this project." followed by a red "Caution" message and three buttons: "< Back", "Next >", and "Cancel".

Group Name:	Project-Testproject1
Project details:	this is just a test....
End date:	1-4-2010
Project folder path:	\\tudelft.net\staff-umbrella\Project\Testproject1
Project folder size:	0
Project quota:	01 GB - GroupFolder Quota
Owner Name:	Michael Stols
Owner NetID :	mstols
Owner E-mail address :	M.S.Stols@tudelft.nl
Owner Phone number :	12345

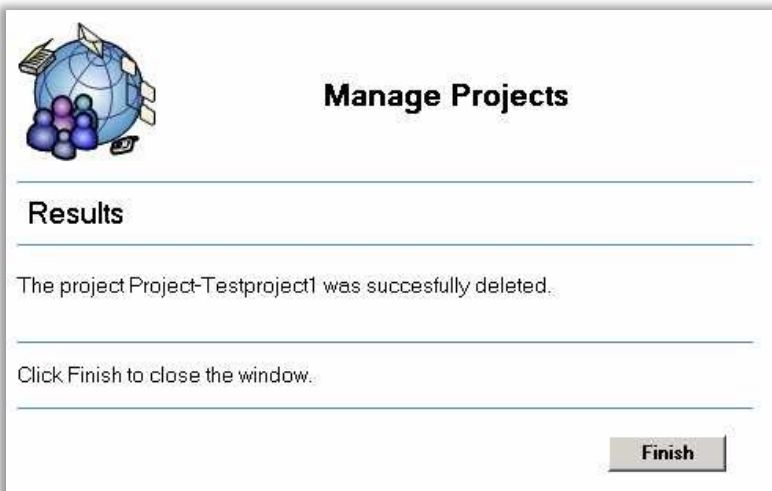
Press Next to delete this project.

Caution: All project files will be deleted!

< Back Next > Cancel

A screen with project details is shown. This includes information about the owner of the project. If the owner has not been contacted yet, it can be done using this information. There is a possibility that the information shown is outdated, because it was collected at the time the project was created.

At this stage, nothing has been deleted yet, so there is still a **Cancel** option. To really delete the project, press **Next**.



The screenshot shows the same "Manage Projects" window, but now the "Results" section is visible. It displays a message stating that the project "Project-Testproject1" was successfully deleted. Below this, there is a message "Click Finish to close the window." and a "Finish" button.

Results

The project Project-Testproject1 was succesfully deleted.

Click Finish to close the window.

Finish

The results are shown. If the project was successfully deleted the screen above is shown. If there was a problem deleting the folder or groups, this will be shown as well. In that case, contact the back office to remove the project manually.