



Umbrella Implementation

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Roadmap for Umbrella deployment

- Project end PaNData 31.03.2014
- Until then deployment of Umbrella
- Project end CRISP 30.09.2014
- Presentation of proposed scenario

Contents „Umbrella Implementation“

- 4 Implementation phases
- Content of implementation
- Format of local user data base
- Determination of first-wave facilities
- Definition of implementation team
- Layout of central website
- Layout of facility website
- Responsibilities
- Problem handling procedures
- Help/info/hotlining
- MoU for time after Umbrella

4 implementation phases

- Phase 0: Implement WUO + Umbrella as standard WUO
- Phase I: Test by local experts
- Phase II: Invite selected friendly users
- Phase III: Open to all users

Phase 0: February to end March 2013

1. Implement WUO + Umbrella as standard WUO

2. Changes to existing WUO are:

- Umbrella handshakes
- Harmonized local user db format
- Umbrella username / password conventions

Decisions:

- **Until end of PaNdata no big MoU needed, small MoU till fall**
- **Documentation: installation recipe available and sent around, can be downloaded from Umbrella website, continuation of implementation meetings planned (telcos)**
- **Björn willing to help, must be paid by institutions that need his help**
- **Björn needed by ESRF for 2-3 days**
- **Idea for implementation: First basic umbrella, services come later**
- **Services could be looked at independently**
- **Idea for ICAT: integration within half a year**

Phase I: end March to end April 2013

1. Test by local experts (few weeks, IT people local user office).
2. Goal: verification of new procedures.

Phase II: Invite selected friendly users May - June 2013

1. Tell them that this is 2nd phase of deployment
2. Inform users on new tools to come (e.g. iCAT; proposal handling)
3. Feedback of users should be implemented until end of August 2013

Decisions concerning friendly users

1. All facilities should provide a list of friendly users to Mirjam
2. Need for definition of friendly users. Need to ensure that only friendly users can login. On the central Umbrella site accounts will be limited.
3. Define point in time when connection between accounts become permanent

Phase III: Umbrella open to users September 2013

1. Dates agreed will be put into MS project file already prepared
2. If you have boundary conditions at your facilities (calls etc.) that are influencing the implementation plan please send them to us ASAP.

Decisions:

- **Do we need an MoU? : if we integrate users, we need to define what happens with the data! Top management at ILL would like to see it before users are integrated.**
- **two documents: one for the users and one for the facility : defining what the implications are of an umbrella account.**
- **Jean Francois will make a draft of such an MoU, also important for other partners outside CRISP & PaNData (e.g. ANKA)**
- **If we do not have in Sept we will have to wait have a year (Elettra comment)**
- **Agree on timeline: yes**

Which tools are implemented?

1. Basic Umbrella

2. Affiliation data base: timing depends here on the progress of the project.

1. Probably March/April 2013 first draft
2. If the tool is not ready stuff has to be put in by hand in the beginning.
3. Do we want to use parts of already existing data bases?

DECISIONS:

- Tools: basic umbrella, Affiliation DB: will be available in Sept. (ESRF commitment) no NO-Go conditions if not yet there

What is the format and the content of the local user database?

1. Decide today on harmonized column in table that was send around

Decisions:

- agree on strong password definition
- define lifetime later after discussing with security experts

Which facilities join the first wave?

1. To keep control first implementation not to many facilities.
2. Discussed: ESRF, ALBA, PSI, HZB, ILL
3. We need to decide on this today!
4. Other facilities enter the process of implementation, when they are ready (within 2013).

Implementation team?

1. One to two persons from each facility.
2. Send names of your delegates ASAP to us
3. Define List of friendly users and send them to us.

**Implementation team:
send names of 2 people + names of friendly users to
Mirjam ASAP**



Layout of central website



[Help](#)

[About us](#) | [About the Umbrella](#) | [Services](#) | [User Offices](#)

ACTIONS

[Create Account](#)

[Contact](#)

[Login](#)

INDEX

Welcome to the Umbrella. Please proceed with a following action:

- [Create new Account](#)
- [Login](#)

Website, services tab:

- Temporary central services from 'friendly user' phase:
 - Replace Alfresco by dms ,
 - Remove services for the time being ? Yes
- Demo pages:
 - Move logos at bottom
 - Index: more descriptive text
 - Use larger characters
 - Remove "national" from national facilities
- Password recovery service: new password generated, sent via email, should be changed by the user (this is not yet implemented)
- Create new account if email account is lost.
- Login: can be used for SSO to other services we have to keep the local username+password for ever
- Frank is writing the security proposal
- What do we do if an account is compromised. User can tell that an account is compromised. Broadcast this to other members.



Layout of local facility website



[Create new account](#) | [Log In](#) | [Contact](#)

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[DUO](#) | [PSI](#) | [SLS](#) | [SINQ](#) | [SpS](#) | [LTP](#) | [SwissFEL](#) | [User Office](#)

PSI Digital User Office (DUO)

DUO

[Log In](#)

[Create new DUO account](#)

[Lost password](#)

[Logout](#)

DUO login

Username

Password

[Login](#)

No account yet?

In case you have no DUO account yet create a new account [\[here\]](#).

Lost your password?

If you do not remember your DUO username and/or password use the [\[Lost password\]](#) function. You will be prompted for your email address and the DUO will email to you login information. Please contact the PSI User Office in case of remaining problems.

Existing Umbrella Account?

In case you have an existing Umbrella account please login here:



What is Umbrella?

For Umbrella Users: please click on the Umbrella login icon:





Layout of central website



Local WUO Website:

- Umbrella Logo is sufficient, no need for more visual communication.
- Rest is up the facilities



Problem handling procedures?

1. To be discussed in management team

Help Info Hotline?

1. To be discussed in management team

MoU

MoU experience from EuroFEL

- **MoU discussion: Who will pay after EU-Projects: facilities, etc.?**
- **Signing an MoU took 1.5 years (EuroFEL), experience: Ute Krell / Mirjam v Daalen**

General considerations

- **We need an official agreement from the involved institutions that we work and we need a commitment (long-term commitment).**
 - **If we integrate users, we need to define what happens with the data! E.g. op management at ILL would like to see it before users are integrated.**
- **This takes some time.- Have an MoU signature before the projects finishes.**
- **First level Support: Local User Office- Second level Support: Umbrella Expert- Agreement if issue is local or central.**
- **If something central is provided a central user office must be provided and this should be in the MoU.**

MoU cont.

Small and Big MoU

- **Two documents: one for the users (Small) and one for the facilities (Big). Define what the implications of an Umbrella account are.**
- **Start with a 'Small MoU', get it signed, and the work on the 'Big MoU'.**
- **Small MoU (for users) ready in September (Jean Francois). Elettra: if not ready in September, will have to wait for one more year. J.F. will make a draft of such a MoU, this will be important also for partners outside CRISP and PaNdata (e.g. ANKA).**
- **Big MoU ready at end of PaNdata and CRISP, but start soon (Mirjam)**

- **This timeline is accepted**

Thank you for your attention!