

Instructions for group managers

Audience of this document

The audience of this document are managers of groups in the Perun group management tool of the LifeScience AAI.

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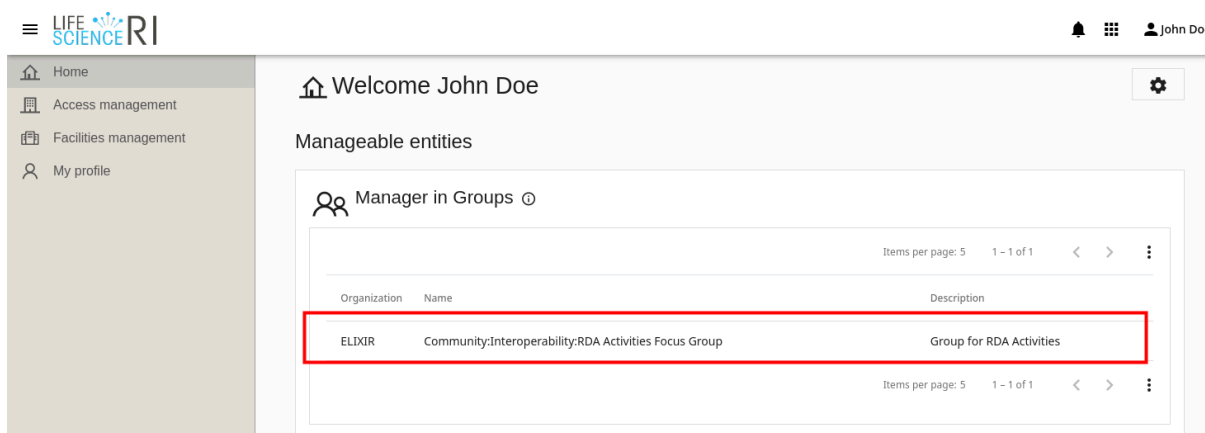
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External references

- [PERUN documentation for group managers](#)

How do you know you are a group manager in Perun?

1. Log in to Perun: <https://perun.aai.lifescience-ri.eu/>
2. In the “Manager in Groups” section (see the screenshot below), you will see the groups where you have a group manager role.



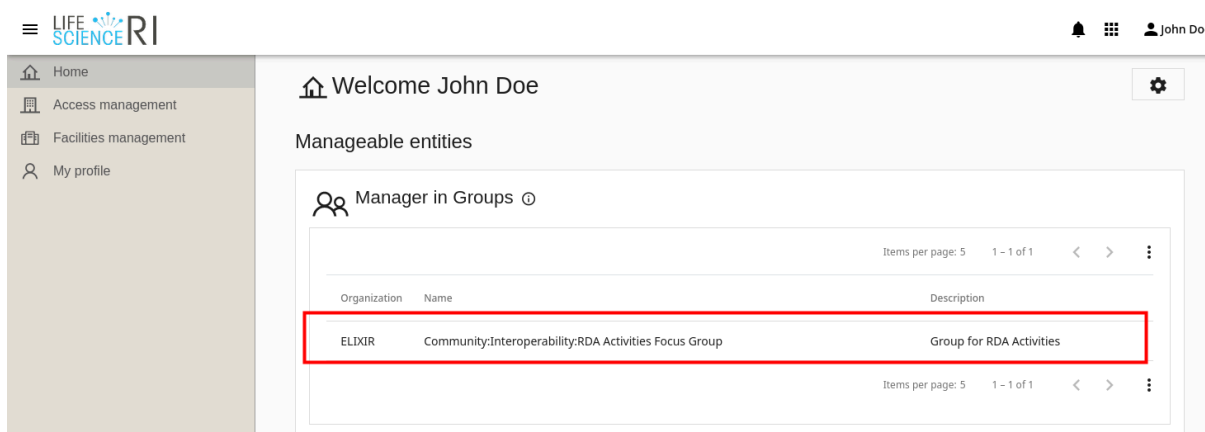
In the Virtual Organization (VO) representing LifeScience or any member community (e.g. ELIXIR, BBMRI), the groups are hierarchical. The group name “Community:Interoperability:RDA Activities Focus Group” means that the “RDA Activities Focus Group” group:

- belongs to the “Community” main branch
- Under the “Community” branch, the group belongs to the “Interoperability” platform

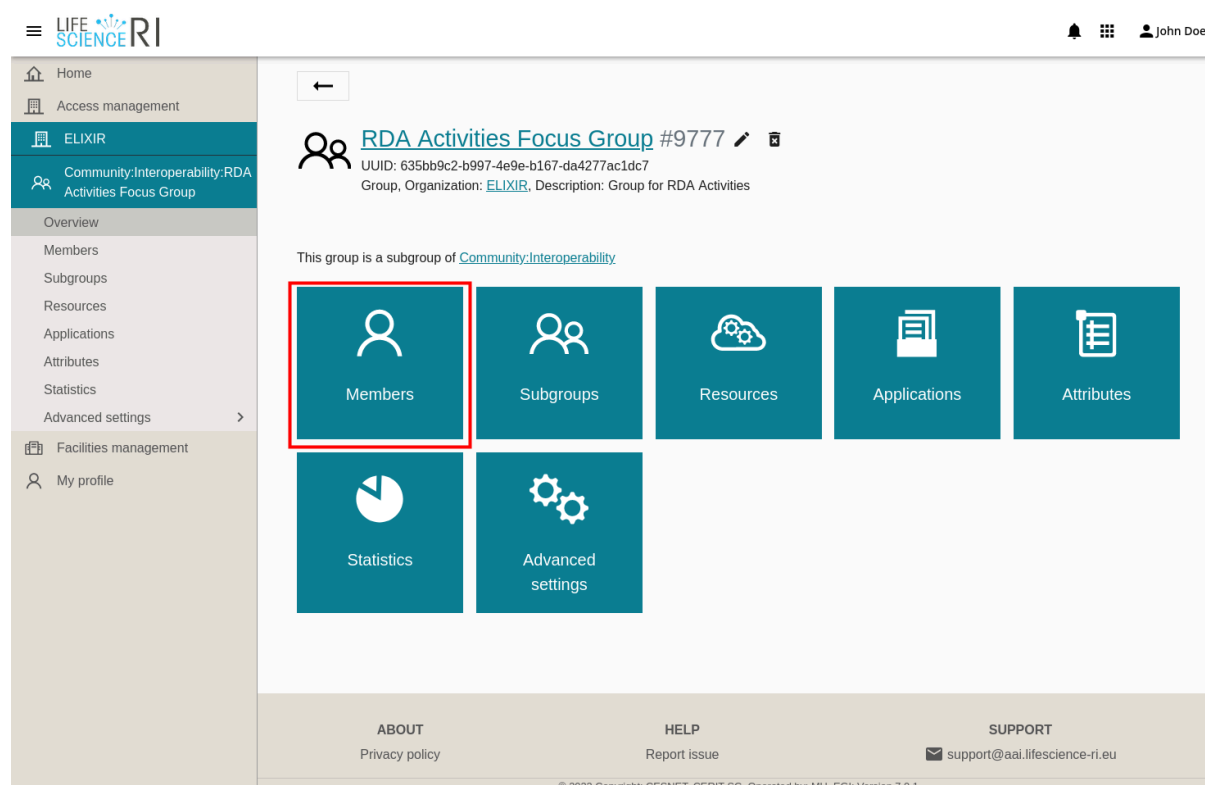
If you want to create a custom group, drop an e-mail to support@aai.lifescience-ri.eu.

Viewing the current members of a group you manage in Perun

1. Log in to Perun (<https://perun.aai.lifescience-ri.eu/>).
2. Select the group you want to view (see the screenshot below).



3. Perun displays some basic information about the group. Select "Members".



4. Perun now displays the members of the selected group.

The screenshot shows the ELIXIR RDA Activities Focus Group page. The left sidebar contains navigation links: Home, Access management, ELIXIR, Community:Interoperability:RDA Activities Focus Group (selected), Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, Advanced settings, Facilities management, and My profile. The main content area displays the group name "RDA Activities Focus Group #9777" with a back arrow, edit icon, and delete icon. Below this is the group's UUID and description. The "Members" section includes filters for organization status (ACTIVE (+1 other)) and group status (ACTIVE), along with a search bar. A table lists members with columns for Name, Organization status, Group status, Organization Email, and Logins. The table shows 10 items per page, with 1-10 of 78 members displayed. The first 10 members are shown, with their names and organization emails redacted (CENSORED). The first 10 members are shown, with their names and organization emails redacted (CENSORED).

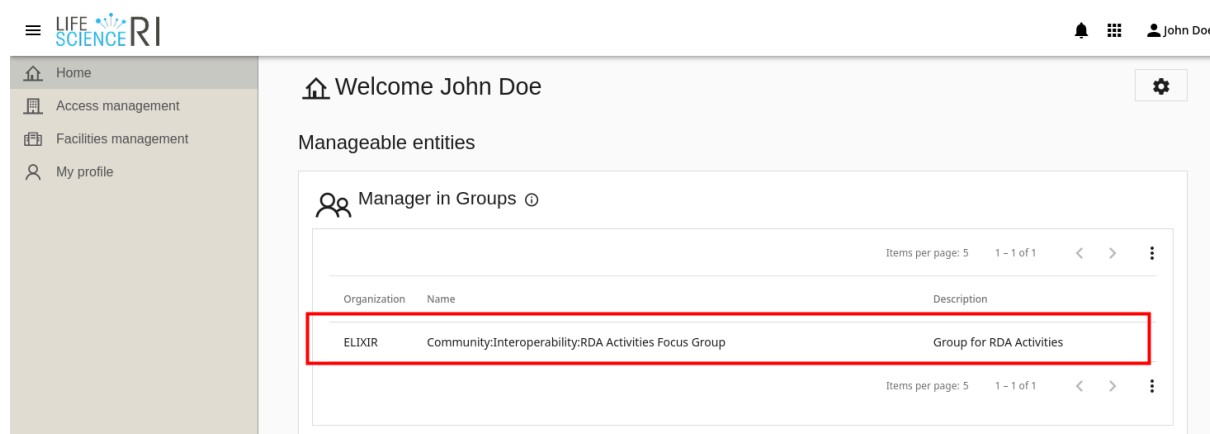
☐	Name ↑	Organization status	Group status	Organization Email	Logins
☐		✓	✓		
☐		✓	✓		
☐		✓	✓		
☐		✓	✓		
☐		✓	✓		
☐	CENSORED	✓	✓		
☐		✓	✓		
☐		✓	✓		
☐		✓	✓		
☐		✓	✓		

Please notice that:

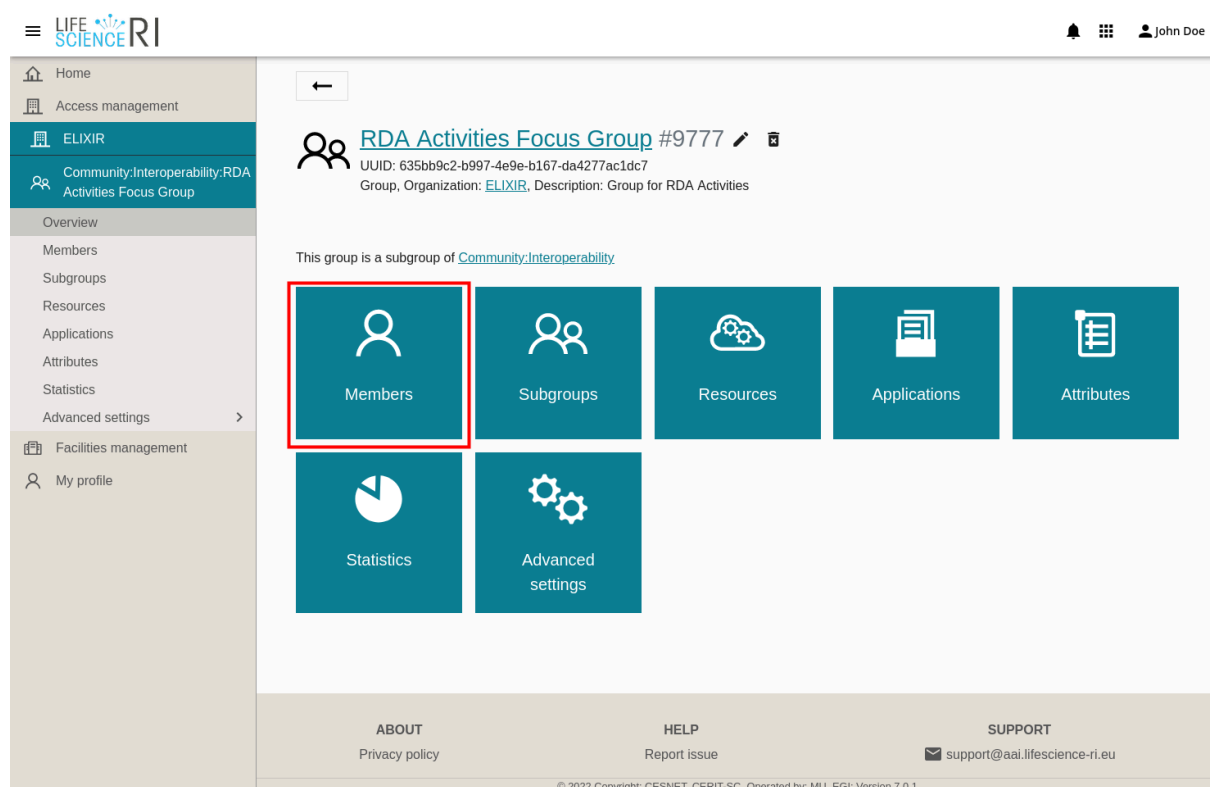
- As a group manager you are *not* automatically a *member* of your group (you need to add yourself as a member).
- Perun has the concept of group membership inheritance; if a person belongs to a group, they also belong to all its parent groups. For instance, a member of "Community:Interoperability:RDA Activities Focus Group" is automatically a member of "Community:Interoperability" and "Community". Such membership is indicated with a special icon depicting "indirect membership".

Adding members to a group you manage in Perun

1. Log in to Perun (<https://perun.aai.lifescience-ri.eu/>).
2. Select the group you want to view (see the screenshot below).



3. Select "Members".



4. "Select "Add".

The screenshot shows the ELIXIR web interface. On the left is a navigation menu with options like Home, Access management, ELIXIR, and Community:Interoperability:RDA Activities Focus Group. The main content area displays the 'RDA Activities Focus Group #9777' with its UUID and description. Below this is a 'Members' section with buttons for 'Add ...', 'Invite ...', and 'Remove'. The 'Add ...' button is highlighted with a red box. Below the buttons is a table of members with columns for Name, Organization status, Group status, Organization, Email, and Logins. The first two rows of the table are partially visible, with some cells containing 'CENSORED'.

5. You can now search the pool of LS users by name, login (LS username) or e-mail address.

The screenshot shows a form titled 'Add member'. It has a text input field labeled 'Search user by name, login or email' and a green 'Search' button. At the bottom right of the form are three buttons: 'Cancel', 'Invite', and 'Add'.

6. Select those user(s) you want to add to the group and click “Add”.

Add member

Search user by name, login or email
mikael Search

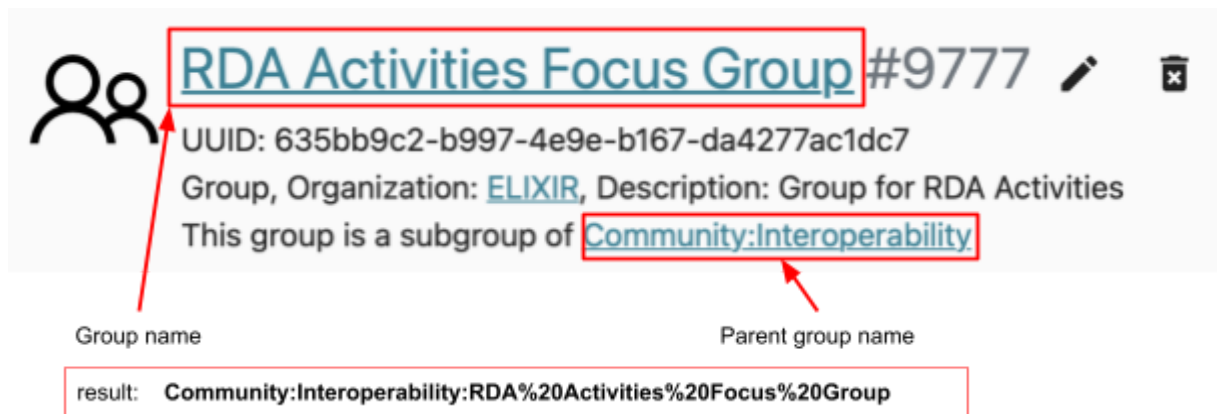
Status	Name ↑	Organization or Ext source	Email	Logins	Already member
☐	✓	Mikael	[REDACTED]		Member of Group Local
☐	⌚	Mikael	[REDACTED]		Member of VO Local
☐	✓	Mikael	[REDACTED]		Member of VO Local
☒	✓	Mikael Linden	mikael.linden@csc.fi		Member of VO Local
☐	🗑️	Mikael	[REDACTED]		Member of VO Local
☐	🕒	Mikael	[REDACTED]		Member Local

Cancel Invite Add

If you can't find the person, they are probably not registered to LS AAI. In that case, proceed to the next item.

7. **To add a member who has not registered with LifeScience AAI (LS Login)** and is therefore unknown to Perun, you have two alternatives:
- You can either ask them to register to Perun at <https://signup.aai.lifescience-ri.eu/fed/registrar/?vo=lifescience> and then add them to the group as described above, or
 - You can first create an invitation form for your group, and then use the “Invite” button (see the screenshots above), or ask them to register manually. At [https://signup.aai.lifescience-ri.eu/fed/registrar/?vo=lifescience&group=\[your_group_full_hierarchical_name\]](https://signup.aai.lifescience-ri.eu/fed/registrar/?vo=lifescience&group=[your_group_full_hierarchical_name]). (the name is a concatenation of the group name and the name of the

“parent group” in the form `urlencode(PARENT_GROUP:GROUP_NAME)`.



- This alternative is briefly described below:
 1. Go to the “Advanced settings” > “Application form” tab of the group you manage. Perun either displays the group’s application form or tells you that it does not exist.
 2. If the application form exists, you can proceed to invite them. Type the person’s name and email address (or just select them from the list) and click “invite” (see the three screenshots above).
 - o The person then receives an email with a link to an application form on Perun that they need to fill in.

The section below contains some advanced Perun functionalities.

3. If the form does not exist, you must create and configure the form and the associated e-mail notifications that Perun sends (or copy them from another group you manage) to the users and group managers involved.
 - o Notice that the application form can have two “Approval styles”: “Manual” or “Automatic” (see the screenshot below) which can be changed in the “Change Setting” dialogue.
 - i. “Automatic” means that when a person is invited to a group, they just need to fill in the application form.
 - ii. “Manual” means that the group manager needs to approve each application in the “Applications” tab of the group.
 - o A user’s application can be “INITIAL” or “EXTENSION”
 - i. “INITIAL” means when the user applies for group membership for the first time.
 - ii. “EXTENSION” means when the user is already a member but their membership is expiring and they need to extend it.

RDA Activities Focus Group #9777

Group, Organization: [ELIXIR](#), Description: Group for RDA Activities

Group

Application form

Module name:

Approval style: → Manual, Manual

Change Settings

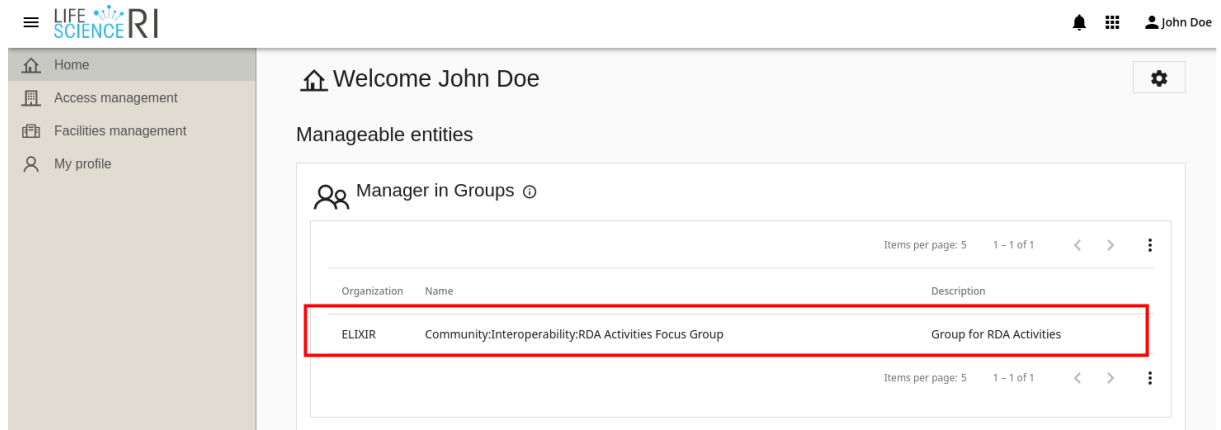
Add Save Application Form Copy from VO/Group Preview

- On the Notifications tab you can edit (or copy from another group that you manage) the content of the email notifications Perun sends to the users and managers of the group.
- The different kinds of e-mail notifications are described below:

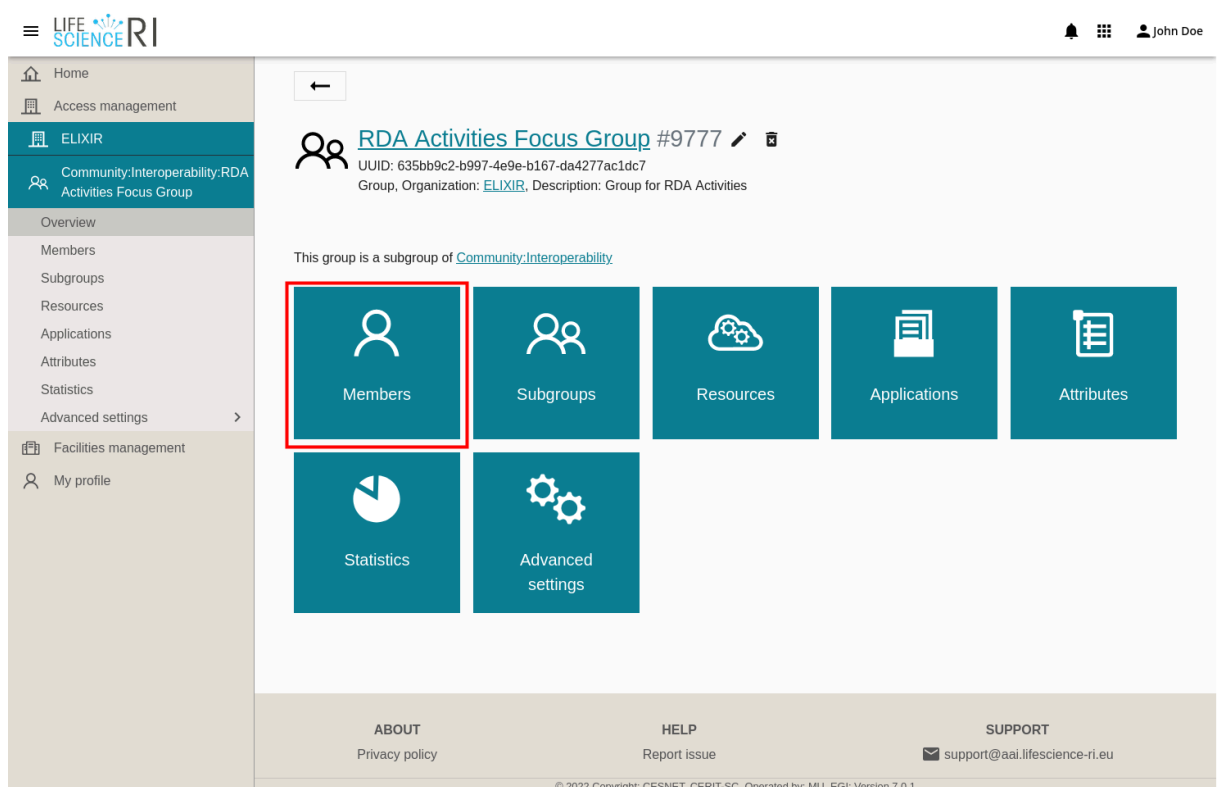
Transaction/receiver of e-mail	Description of the e-mail
Created/user	mail that will be sent to a user after their registration to a group
Mail validation/user	mail that will be sent to a user to validate their email address provided in application form
Created/manager	notification to the group manager that a new user wants to become a member of the group
Approved/user	mail to the user that their application was approved by the group manager
Rejected/user	mail to the user that their application was rejected by the group manager
Invitation/user	an invitation to a user to join this group

Deleting members of a group you manage in Perun

1. Log in to Perun (<https://perun.aai.lifescience-ri.eu/>).
2. Select the group you want to view (see the screenshot below).



3. Select "Members".



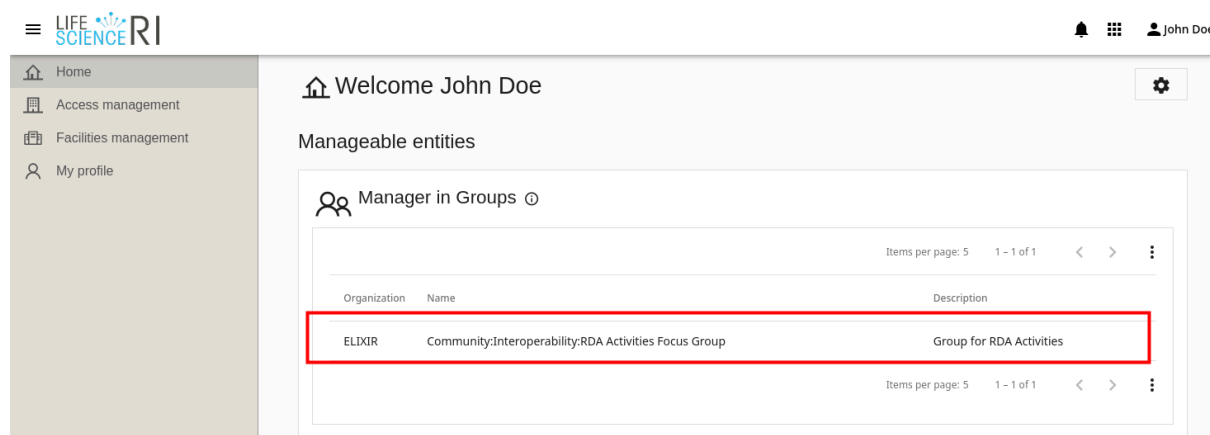
4. Select the person you want to delete from the group and click "Remove". Then confirm the deletion.

The screenshot shows the ELIXIR RDA Activities Focus Group #9777 management interface. The left sidebar contains navigation links: Home, Access management, ELIXIR, Community:Interoperability:RDA Activities Focus Group, Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, Advanced settings, Facilities management, and My profile. The main content area displays the group's name, UUID (635bb9c2-b997-4e9e-b167-da4277ac1dc7), and description (Group for RDA Activities). Below this is the 'Members' section, which includes a 'Remove' button highlighted with a red box. The 'Members' section also features filters for 'Filter by organizations status' (ACTIVE (+1 other)) and 'Filter by group status' (ACTIVE), along with a search bar. A table of members is shown below, with columns for Name, Organization status, Group status, Organization, Email, and Logins. The first member's name is redacted with a 'CENSORED' box, and the first member's email is also redacted with a 'CENSORED' box. The table shows two members, both with 'ACTIVE' status in both organization and group categories.

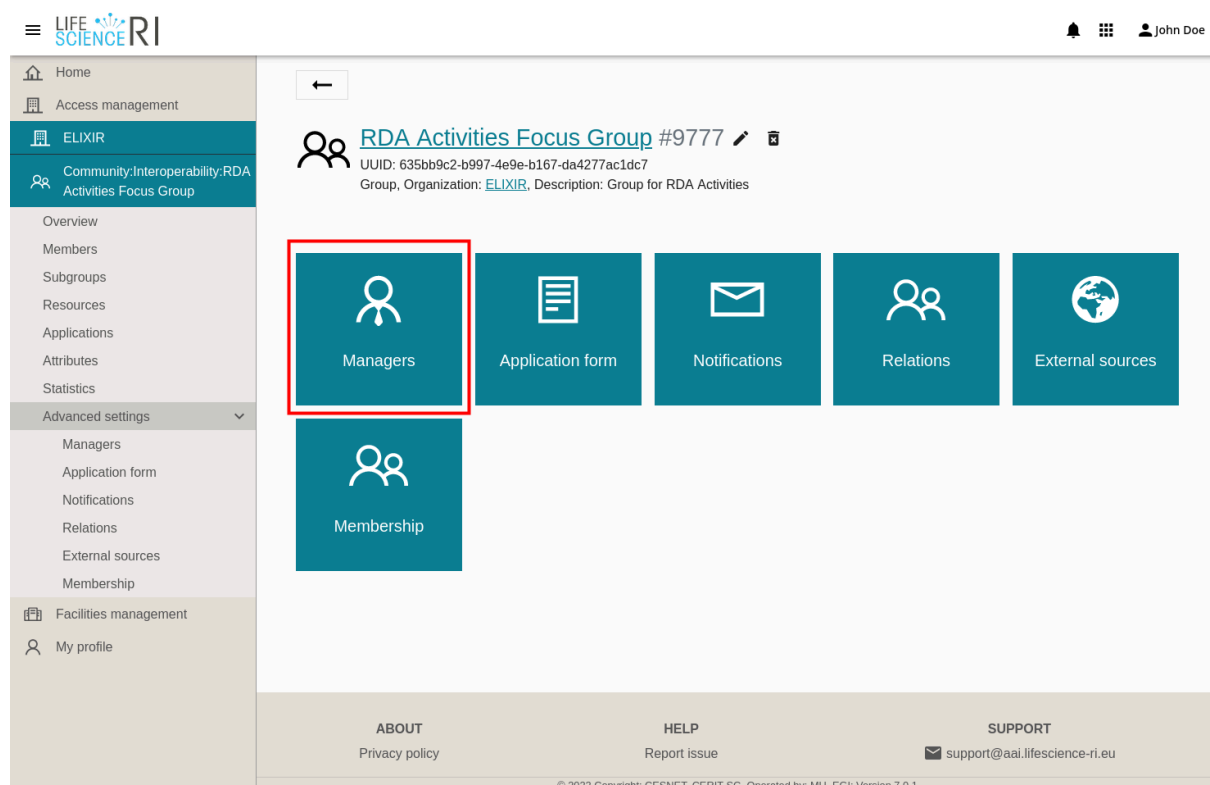
Please notice that this doesn't delete the person from the LS AAI. It just removes their membership in this group (and its parents, unless the person is a member of another child group).

Viewing, adding, and deleting group managers in Perun

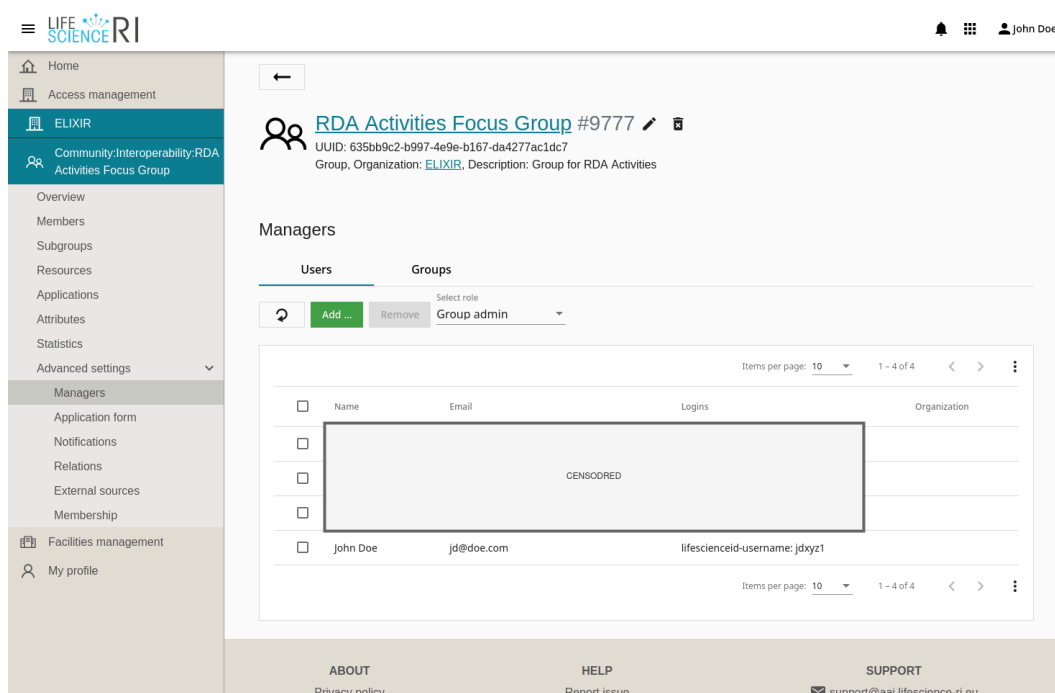
1. Log in to Perun (<https://perun.aai.lifescience-ri.eu/>).
2. Select the group you want to view (see the screenshot below).



3. Select the "Advanced setting" > "Managers" tab (see the screenshot below).



4. Perun now displays the current managers of the group (including you)



4. **To delegate** the group manager role (i.e. to nominate a new group manager), select “Add” and (see the screenshot below) search the pool of LS AAI users by name, login (LS username) or e-mail address. You can also nominate a group to be a manager of another group, which means all members in the first group are automatically managers in the latter group. You can also delegate a “group observer” role for a person who can view but not edit the group’s settings.

Add manager

Select role
Group admin

Search user by name, login or email

Search

CancelAdd

5. **To delete** a group manager role (see the screenshot below):

1. Select the group manager to delete.
2. Click "Remove".
3. Then confirm the deletion.

The screenshot shows the LIFE SCIENCE RI web interface. The left sidebar contains navigation links: Home, Access management, ELIXIR, Community/Interoperability/RDA Activities Focus Group, Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, Advanced settings, Managers, Application form, Notifications, Relations, External sources, Membership, Facilities management, and My profile. The main content area displays the 'RDA Activities Focus Group #9777' page. The 'Managers' tab is selected, and the 'Remove' button is highlighted with a red box. Below the buttons is a table of managers with columns for Name, Email, Logins, and Organization. The table contains one entry: John Doe, jd@doe.com, lifescienceid-username: jdxz1. The 'Remove' button is highlighted with a red box.

Note: if you wish to nominate a group of people, switch to the "groups" tab and use the same mechanism, while searching for the group instead of a single user that you wish to nominate as managers. This way all of the members of the "administrators" group will be granted the group administrator privileges.

Note: you can also grant other roles. The difference between the *group admin* and *membership manager* roles is in the permissions granted to the related group. The *membership manager* can only add and remove people (manage membership), while the *group admin* can also configure settings related to the group (e.g. managers, attributes, application form, relations, ...)