

Manual Assignment of an Affiliation

Instructions for designated home organisation representatives
Life Science AAI

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Introduction

Access to Life Science services requires sometimes that the user has a confirmed affiliation with a home organisation (e.g. a university, research institution or private company). The preferred way for LS AAI to learn the affiliation is by the user logging in to LS AAI using the home organisation credentials and the home organisation releases programmatically to LS AAI an attribute describing the affiliation (for instance, an assertion that they are a researcher at the university). For technical and other reasons, not all home organisations support it.

As a plan B, LS AAI supports a model where a designated person in the home organisation is granted rights to manually elevate any LS AAI user to a specified affiliation in that organisation. The affiliation is then valid for the next 12 months after which it needs to be renewed. In practice, the “designated person” is made a manager of a group of users who have the manually assigned affiliation. The manual assignment of affiliation is done using a graphical UI provided by the LS AAI (Perun system) and is described in this document.

Background

LS AAI provides to the downstream Relying Parties (Service Providers) a [voPersonExternalAffiliation](#) attribute describing the user's affiliation with their home organisation. The attribute is populated with a value *member* or *affiliate* concatenated with the home organisation's DNS domain name, with 'at' sign as a separator. The semantics of the values are described in the table below:

faculty	The person is a researcher or teacher in their home organisation. The exact interpretation is left to the home organization, but the intention is that the primary focus of the person in their home organisation is in research and/or education. Note. This attribute value is for users in the <i>academic</i> sector.
member	Member is intended to include <i>faculty</i> , <i>industry-researcher</i> , <i>staff</i> , <i>student</i> and other persons with a full set of basic privileges that go with membership in the home organisation, as defined in eduPerson. In contrast to <i>faculty</i> , among other things, this covers positions with managerial and service focus, such as service management or IT support.

Example values:

- `faculty@helsinki.fi`
- `member@ebi.ac.uk`

The attribute can be used, for instance, to access a registered access beacon.

Prerequisites

1. The home organisation must nominate a designated person who is granted rights to manually elevate the person to an affiliation status in LS AAI
2. The person must have registered an LS ID
(<https://lifescience-ri.eu/ls-login/users/how-to-get-and-use-life-science-id.html>)

Process to activate this feature

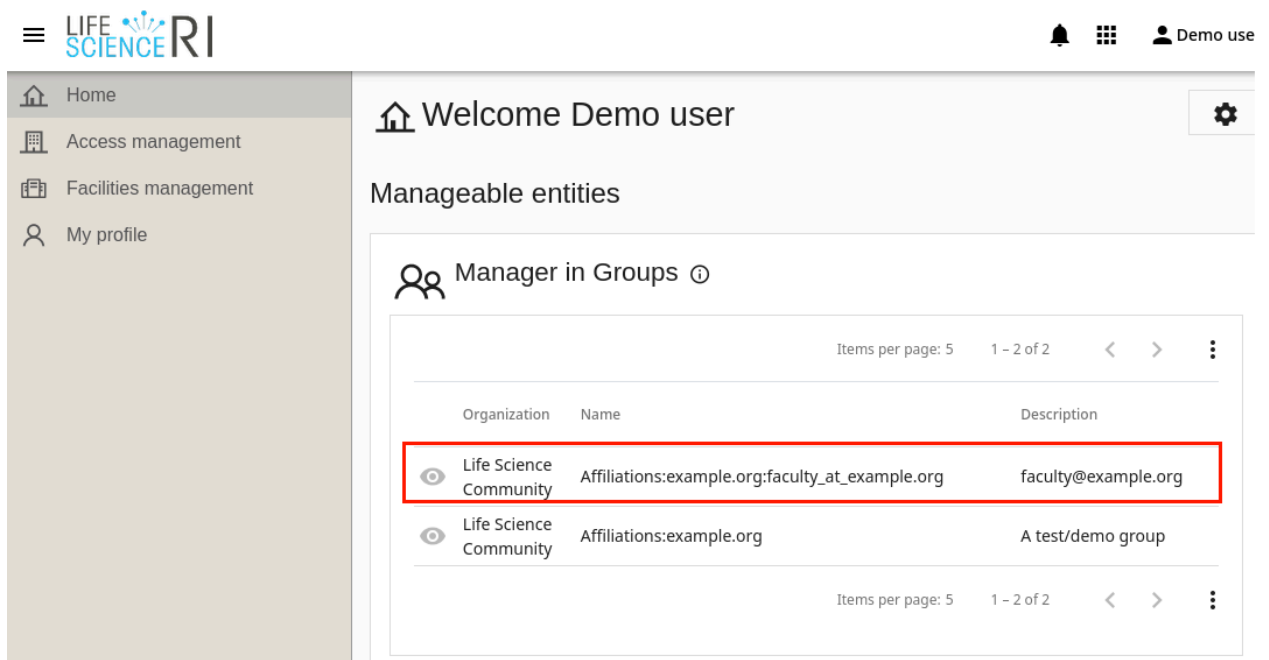
1. Drop e-mail to support@aai.lifescience-ri.eu with following information
 - Your LS ID (you can find it [here](#), in the row next to "LS ID")
 - What values (*faculty* and/or *member* plus the DNS domain of the organization, e.g. *csc.fi*) are you permitted to assign to users. (N.B. *member* value follows automatically from *faculty*.)
2. Wait until LS AAI support team informs you the feature is configured for you
 - In particular, you will be told the LS AAI group name that is projected to the affiliation value and whose group manager you are made.

Elevating users to an affiliation

You can apply any of the three alternatives both for the initial assignment of affiliation and for the renewal after the expiration in 12 months.

Alternative 1: Add directly (no user activity needed)

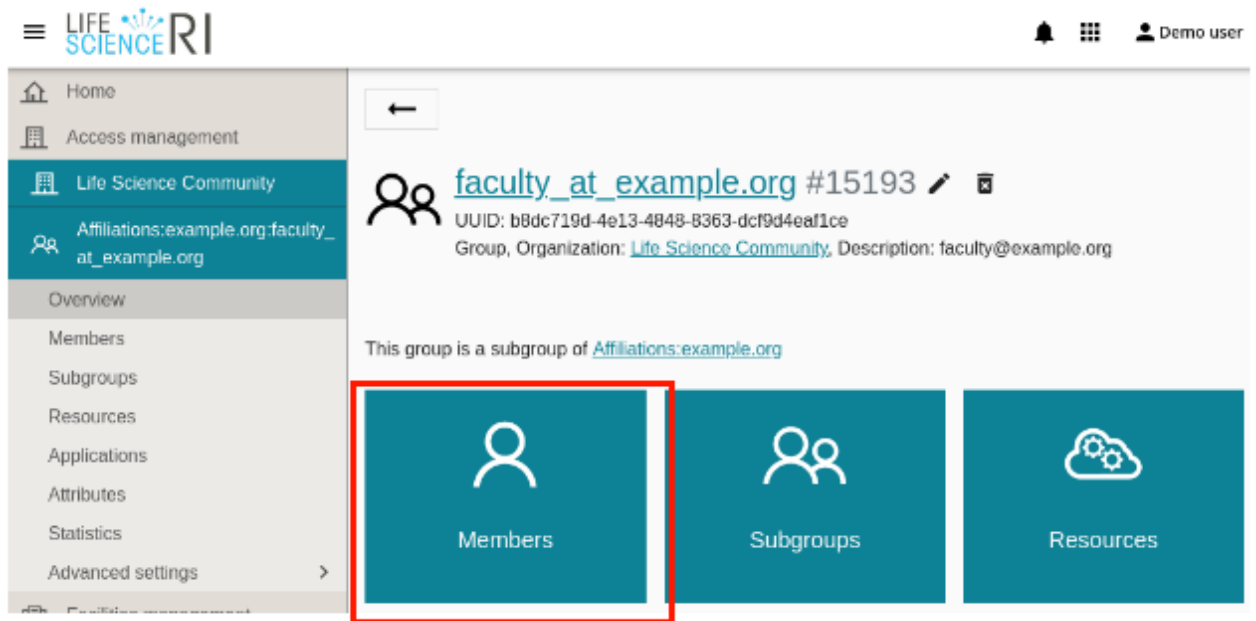
1. User your LS ID to log in to <https://perun.aai.lifescience-ri.eu/>. As a designated representative of your home organisation, you should see a entry in the table stating “Manager in Groups”
2. From the table, select the group that is projected to the affiliation value



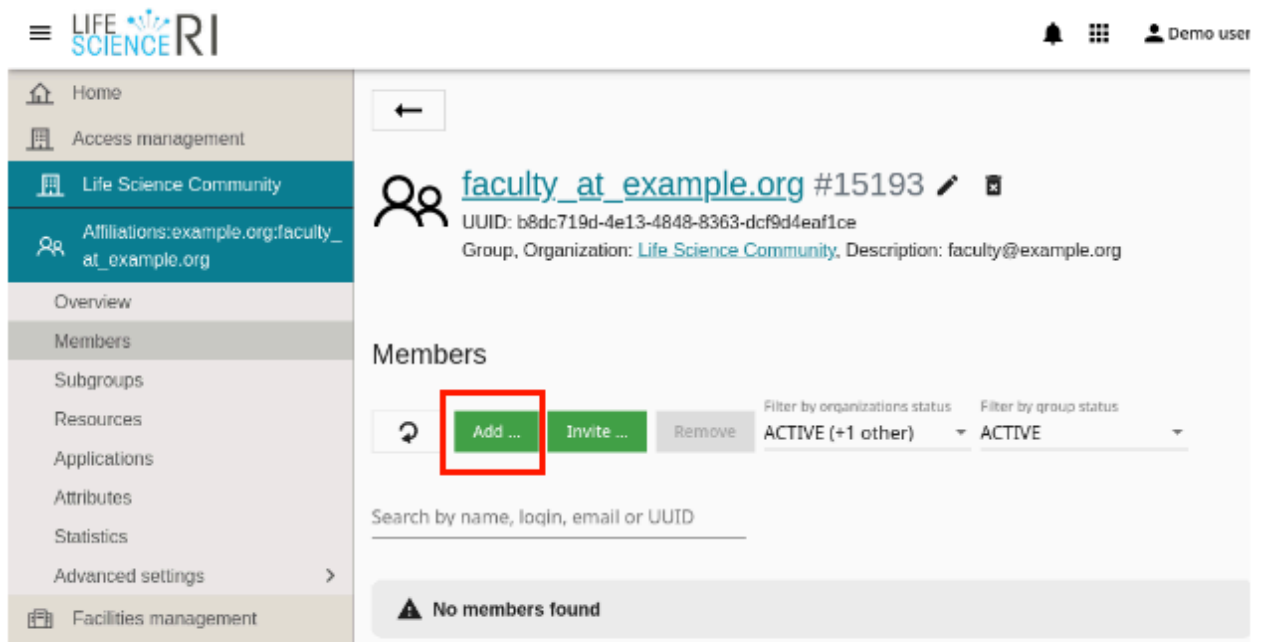
The screenshot shows the LIFE SCIENCE RI web interface. On the left is a sidebar with navigation links: Home, Access management, Facilities management, and My profile. The main content area is titled 'Welcome Demo user' and 'Manageable entities'. Below this is a section titled 'Manager in Groups' with a table of entities. The table has columns for Organization, Name, and Description. The first row is highlighted with a red box, showing 'Life Science Community' with the affiliation 'example.org:faculty_at_example.org' and email 'faculty@example.org'. The second row shows 'Life Science Community' with the affiliation 'example.org' and description 'A test/demo group'.

Organization	Name	Description
Life Science Community	Affiliations:example.org:faculty_at_example.org	faculty@example.org
Life Science Community	Affiliations:example.org	A test/demo group

3. Click on the members tile



4. Click on the “Add ...” button:



5. Type in the name of the user (1.), click on “Search” (2.), check the checkbox of in the row with person you want to add to the group (3.), and hit add button (4.).

Add member

Search user by name, login or email *

Tester

1.

Search

2.

		Items per page: 10		1 – 3 of 3		< > ⋮	
	Status	Name ↑	Organization or Ext source	Email	Logins	Already member	
3.	<input checked="" type="checkbox"/>	tester 2		testuserdenbi2_@gmail.com		Member of VO	Local
	<input type="checkbox"/>	tester 4D		testuserdenbi4@gmail.com		Member of VO	Local
	<input type="checkbox"/>	Test Testerson		xxxx.justtestingsomething.xxxx@gmail.com		Member of VO	Local
		Items per page: 10		1 – 3 of 3		< > ⋮	

4.

Cancel

Invite ▾

Add

Alternative 2: Invite user by e-mail (to fill an application)

1. User your LS ID to log in to <https://perun.aai.lifescience-ri.eu/>. As a designated representative of your home organisation, you should see a entry in the table stating “Manager in Groups”
2. From the table, select the group that is projected to the affiliation value

The screenshot shows the LIFE SCIENCE RI web interface. On the left is a sidebar with navigation links: Home, Access management, Facilities management, and My profile. The main content area is titled 'Welcome Demo user' and 'Manageable entities'. Under 'Manager in Groups', there is a table with the following data:


Organization	Name	Description
Life Science Community	Affiliations:example.org:faculty_at_example.org	faculty@example.org
Life Science Community	Affiliations:example.org	A test/demo group

The first row is highlighted with a red box. The table includes pagination controls at the top and bottom: 'Items per page: 5' and '1 - 2 of 2'.


3. Click on the members tile




The screenshot shows the LIFE SCIENCE RI web interface. On the left is a sidebar with navigation links: Home, Access management, Life Science Community, Affiliations:example.org:faculty_at_example.org, Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, and Advanced settings. The main content area shows the details for the group 'faculty_at_example.org #15193'. It includes the group's UUID, organization, and description. Below this, there are three tiles: 'Members', 'Subgroups', and 'Resources'. The 'Members' tile is highlighted with a red box.

4. Click on the “Invite...” button

 🔔 🏠 👤 Demo user


- Home
- Access management
- Life Science Community
- Affiliations: example.org: faculty_at_example.org
- Overview
- Members
- Subgroups
- Resources
- Applications
- Attributes
- Statistics
- Advanced settings
- Facilities management



 [faculty_at_example.org](#) #15193  


UUID: b8dc719d-4e13-4848-8363-dcf9d4eaf1ce
Group, Organization: [Life Science Community](#), Description: faculty@example.org

Members


Add ...
Invite ...
Remove
Filter by organizations status
Filter by group status

ACTIVE (+1 other)
ACTIVE

Search by name, login, email or UUID

 No members found

5. Type the person's Name and e-mail you want to invite to apply for membership

Invite member

The person you are inviting will receive an email with a link to the groups application form. You can set up an email template in: (Group) Settings -> Notifications.

Name *

Invited user

Email *

invited@example.org

Language

English

Cancel Invite

- a. When you click "Send invitation", the invited person is sent an e-mail invitation to fill an application for the affiliation. The person needs to click that link and then log in (or register) to LS AAI
- b. From this on, follow the instructions of **Alternative 3** below

Alternative 3: Provide a link (for any user to fill an application)

You can provide (for instance, in you organisation's intranet, by e-mail, etc) the following link to users:

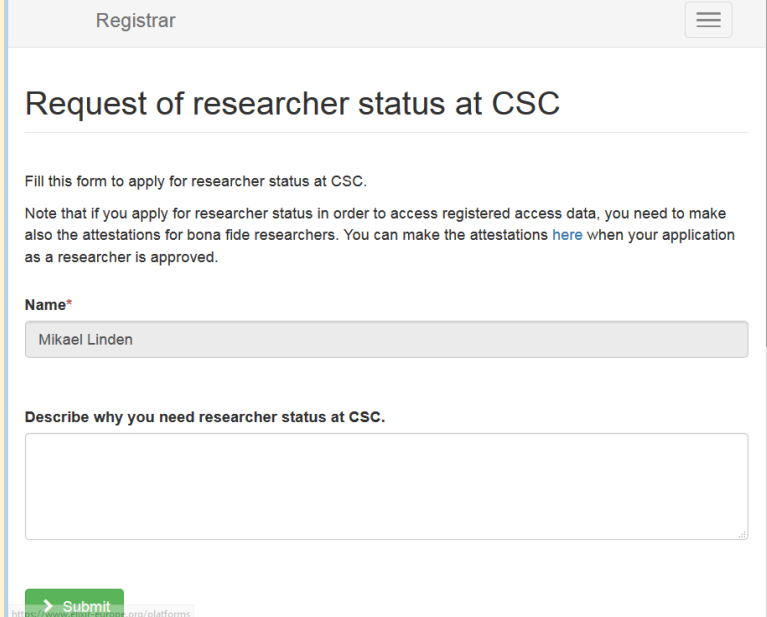
<https://signup.aai.lifescience-ri.eu/registrar/?vo=lifescience&group=your group's URL encoded name>

For instance:

<https://singup.aai.lifescience-ri.eu/registrar/?vo=elixir&group=Nodes%3AFinland%3ACSC%3AResearcher>

Anyone can click that link and are then requested to log in using their LS ID (if they don't have one, they need to first register).

This is an example of the registration page the invited person will see when they have clicked the link and logged in. As a group manager you can customise the text of the page and the invitation e-mail (see section Customising the affiliation assignment process):



Registrar

Request of researcher status at CSC

Fill this form to apply for researcher status at CSC.

Note that if you apply for researcher status in order to access registered access data, you need to make also the attestations for bona fide researchers. You can make the attestations [here](#) when your application as a researcher is approved.

Name*

Mikael Linden


Describe why you need researcher status at CSC.





[Submit](#)

<https://www.csc.fi/eng/platforms>

When a user has applied for the affiliation, you will receive an e-mail notification. Follow these instructions:

1. User your LS ID to log in to <https://perun.aai.lifescience-ri.eu/>. As a designated representative of your home organisation, you should see a entry in the table stating "Manager in Groups"
2. From the table, select the group that is projected to the affiliation value

 🔔 ⌵ 👤 Demo use



 Home
 Access management
 Facilities management
 My profile

Welcome Demo user

Manageable entities


Manager in Groups ⓘ





Items per page: 5 1 - 2 of 2 < > ⋮

Organization	Name	Description
 Life Science Community	Affiliations:example.org:faculty_at_example.org	faculty@example.org
 Life Science Community	Affiliations:example.org	A test/demo group

Items per page: 5 1 - 2 of 2 < > ⋮

3. Click on the Applications tile

 🔔 ⌵ 👤 Demo us

 Home
 Access management
 Life Science Community
 Affiliations:example.org:faculty_at_example.org

Overview

Members

Subgroups



Resources


Applications




Attributes

Statistics


Advanced settings >


 Facilities management
 My profile





 [faculty_at_example.org](#) #15193  
 UUID: b8dc719d-4e13-4848-8363-dcf9d4eaf1ce
 Group, Organization: [Life Science Community](#), Description: faculty@example.org


This group is a subgroup of [Affiliations:example.org](#)


 Members


 Subgroups

 Resources

 Applications

 Attributes

 Statistics

 Advanced settings

4. Adjust the filters (1.) if needed and click on the row with the application you want to review (2.)

- Home
- Access management
- Life Science Community
- Affiliations:example.org:faculty_at_example.org
- Overview
- Members
- Subgroups
- Resources
- Applications
- Attributes
- Statistics
- Advanced settings
- Facilities management
- My profile

faculty_at_example.org #15193

UUID: b8dc719d-4e13-4848-8363-dcf9d4eaf1ce
 Group, Organization: [Life Science Community](#), Description: faculty@example.org

Application

Show more details

State Pending

Filter

Start date

24.5.2021

End date

24.5.2022

1.

Created Date	Type	State	Created by	Group name	Modified by
24.5.2022	→	Submitted	104797873102532082969@accounts.google.com	Affiliations:example.org:faculty_at_example.org	104797873

- Review the application. Approve or reject the membership application by clicking (2) “Approve” or “Reject”.

Application detail #40890

Approve

Reject

Re-send notifications

Application for Group: Affiliations:example.org:faculty_at_example.org **in Organization:** Life Science Community
State: Submitted
Type: → Initial

Submitted by: John Doe
From External Source: <https://idhub.aai.lifescience-ri.eu/proxy/aHR0cHM6Ly9hY2NvdW50cy5nb29nbGUuY29t>
Level of Assurance: 0
Date: 24.5.2022 6:47:00

Name

John Doe

Describe why you need a faculty member status at your home organisation.

testing scenarios

Reviewing/revoking manually assigned affiliations

You can review and revoke manually assigned affiliations any time. Revocation becomes effective immediately.

1. Use your LS ID to log in to <https://perun.aai.lifescience-ri.eu/>. As a designated representative of your home organisation, you should see a entry in the table stating “Manager in Groups”
2. From the table, select the group that is projected to the affiliation value

The screenshot displays the Life Science RI Perun web interface. On the left is a navigation sidebar with the following menu items: Home, Access management, Life Science Community, Affiliations:example.org:faculty_at_example.org, Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, Advanced settings, Facilities management, and My profile. The main content area shows the details for the group 'faculty_at_example.org #15193'. It includes the group's UUID (b8dc719d-4e13-4848-8363-dcf9d4eaf1ce) and its description (faculty@example.org). Below this, a message states 'This group is a subgroup of Affiliations:example.org'. A grid of six teal buttons is displayed: Members, Subgroups, Resources, Applications (highlighted with a red border), Attributes, and Statistics. The top right corner of the interface shows a notification bell, a grid icon, and the user profile 'Demo us'.

3. Click on the “Members” tile

The screenshot shows the LIFE SCIENCE RI web interface. On the left is a sidebar with navigation links: Home, Access management, Life Science Community, Affiliations:example.org.faculty_at_example.org, Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, Advanced settings, Facilities management, and My profile. The main content area displays the group 'faculty_at_example.org #15193' with its UUID and description. Below this, a grid of seven teal tiles is shown: Members (highlighted with a red border), Subgroups, Resources, Applications, Attributes, Statistics, and Advanced settings. A note above the tiles states 'This group is a subgroup of Affiliations:example.org'.

4. You will see the current list of users in that group (i.e. persons who have the manually assigned affiliation)

The screenshot shows the 'Members' page of the LIFE SCIENCE RI interface. The sidebar is identical to the previous screenshot, but the 'Members' link is now active. The main content area shows the group 'faculty_at_example.org #15193'. Below the group header, there are buttons for 'Add ...', 'Invite ...', and 'Remove', along with filters for 'Filter by organizations status' (ACTIVE (+1 other)) and 'Filter by group status' (ACTIVE). A search bar is labeled 'Search by name, login, email or UUID'. Below the search bar is a table with one member listed. The table has columns for Name, Organization status, Group status, Organization, Email, and Logins. The member listed is John Doe, with both Organization and Group status marked as active (green checkmarks). The email is john.doe@mail.net and the login is lifescienceid-username: jd123. Pagination controls at the bottom show 'Items per page: 10' and '1 - 1 of 1'.

	Name	Organization status	Group status	Organization	Email	Logins
<input type="checkbox"/>	John Doe	✓	✓		john.doe@mail.net	lifescienceid-username: jd123

5. To revoke an affiliation, select the group member (1.) and click Remove (2.). The revocation takes place immediately. The user is not informed on the revocation.

Group, Organization: [Life Science Community](#), Description: faculty@example.org



2.

Remove

Filter by organizations status Filter by group status
ACTIVE (+1 other) ACTIVE

Search by name, login, email or UUID

Items per page: 10 1 - 1 of 1 < > ⋮

	Name	Organization status	Group status	Organization	Email	Logins
1. <input checked="" type="checkbox"/>	John Doe				john.doe@mail.net	lifescienceid-username: jd123

Items per page: 10 1 - 1 of 1 < > ⋮

Customising the affiliation assignment process

As a group manager, you are able to customise the group membership application process, including the application form and the e-mail messages sent.

Editing the affiliation application form

From the group overview page, navigate to “Advanced settings ->Application Form”. This will open a form editor where you can edit the form that a user is presented when they apply for the affiliation value:

The screenshot shows the 'Application form' editor in the Life Science RI system. On the left is a sidebar with navigation links: Home, Access management, Life Science Community, Affiliations:example.org:faculty_at_example.org, Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, Advanced settings (expanded), Managers, Application form (selected), Notifications, Relations, External sources, Membership, Facilities management, and My profile. The main content area shows the 'Application form' settings for a group with UUID: b8dc719d-4e13-4848-8363-dcf9d4eaf1ce and description: faculty@example.org. It includes fields for 'Module name' and 'Approval style' (set to Manual). Below these are buttons for 'Add ...', 'Save Application Form', 'Copy from Organization/Group ...', and 'Preview'. A table lists the form elements:

Short name	Type	Disabled	Hidden	Preview
heading_extension	Header			Request to extend faculty status in Life Science Login
heading	Header			Request of faculty status in Life Science Login
Introduction	Custom HTML text			<p>Some Life Science Login services require that you are recognised as a faculty member in a particular home organisation. Fill this form to apply for "faculty" status at your home organisation. The application is then sent to your home organisation representative for review.</p> <p>Faculty member means that the person is a researcher or teacher in his/her home organization. The exact interpretation is left to the home organization, but the intention is that the primary focus of the person in his/her home organization is in research and/or education.</p> <p>The status will be effective for 12 months after which you need to re-apply.</p>

There are two kind of application forms:

- **Initial** application is presented to a user when they apply for the first time
- **Extension** application is presented to a user whose affiliation has expired after 12 months and who is re-applying

These settings are managed in the dialog opened by clicking the “Change settings” button.

You can add (“Add...” button) various form elements, such as text fields, checkboxes and radiobuttons, lists and fixed text elements. You can also copy the form from another group you

are a manager of (“Copy from Organization/Group ...” button). Remember to click “Save” when finished.

See the [Perun manual](#) for more instructions on the form editor.

Editing the e-mail notifications

From the group overview page, navigate to “Advanced settings -> Notifications” to edit the e-mail messages the Perun system sends during the group application process:

The screenshot shows the Perun web interface. On the left is a sidebar with a menu including: Home, Access management, Life Science Community, Affiliations: example.org:faculty_at_example.org, Overview, Members, Subgroups, Resources, Applications, Attributes, Statistics, Advanced settings (expanded), Managers, Application form, Notifications (selected), Relations, External sources, Membership, Facilities management, and My profile. The main content area is titled 'Email notifications' and shows a list of notification types. At the top, there are buttons for 'Add ...', 'Remove', 'E-mail footer ...', and 'Copy from Organization/Group ...'. The list has columns for 'E-Mail type', 'Application type', and 'Sending enabled'. All entries have 'Initial' as the application type and 'Sending enabled' checked. The footer contains links for 'ABOUT' (Privacy policy), 'HELP' (Report issue), and 'SUPPORT' (support@aai.lifescience-ri.eu). A copyright notice at the bottom reads: '© 2022 Copyright: CESNET, CERIT-SC, Operated by: MU, EGI; Version 7.0.1'.

E-Mail type	Application type	Sending enabled
<input type="checkbox"/> Created / user	→ Initial	<input checked="" type="checkbox"/>
<input type="checkbox"/> Approved / user	→ Initial	<input checked="" type="checkbox"/>
<input type="checkbox"/> Invitation / user	→ Initial	<input checked="" type="checkbox"/>
<input type="checkbox"/> Rejected / user	→ Initial	<input checked="" type="checkbox"/>
<input type="checkbox"/> Created / manager	→ Initial	<input checked="" type="checkbox"/>

Created/manager	The notification e-mail to the group manager that a new user has applied for the group membership.
Rejected/user	The e-mail to the user that their application was rejected by the group manager.
Invitation/user	The invitation e-mail for a user to join the group.
Approved/user	The e-mail to the user that the group manager has approved their application and they have received the affiliation value.
Created/user	The e-mail that will be sent to the user when they submit an application to become a group member.

Click the e-mail message you want to edit. You can also copy the messages from another group you are a manager of by clicking “Copy from Organization/Group...”. For more information, see the [Perun manual](#).

Reviewing affiliation value and application notification recipients

Using the “Attributes” tab on the group overview page, you will open settings page, where you can

1. Review and update the e-mail addresses to which a notification of a new application (see Created/manager in the previous section) is sent. Remember to press “Save” button after changes.
2. Review the “Group affiliations” attribute which describes the voPersonScopedAffiliation attribute value to which the membership in this group is projected. This value is set by LS AAI administrators and you cannot change it.




The screenshot displays the Perun web interface for managing group attributes. The sidebar on the left contains navigation links: Home, Access management, Life Science Community, Affiliations: example.org: faculty_at_example.org, Overview, Members, Subgroups, Resources, Applications, Attributes (selected), Statistics, Advanced settings, Facilities management, and My profile. The main content area shows the group 'faculty_at_example.org' with its UUID and description. The 'Attributes' tab is active, showing a table of attributes. Two attributes are highlighted with red boxes and numbered:

1. **"To" email addresses**: This attribute is used for email notifications. The current values are 'admin@example.org' and 'cto@org.edu'. A 'New value' input field is provided for adding more addresses.
2. **Group affiliations**: This attribute shows the group affiliation value, which is 'faculty@example.org'.

Other attributes visible in the table include 'Group membership expiration rules' with a value of 'period +1d' and a description: 'Set of rules to determine date of group membership expiration. If not set, membership is not limited.'

Testing the affiliation attribute

Any user can browse to <https://profile.aai.lifescience-ri.eu/> to review their current affiliation attributes (either those assigned manually or received programmatically from the home organisation(s)). Changes reflect immediately at that page:

  User Profile 

Profile

Name

John Doe


LS ID

saf56asf654g6a6fc65gas654a5x465fg8a7684y6x5a@lifescience-ri.eu

LS Username

jd123

Preferred mail


john.doe@mail.net 

Affiliations

member@example.org

facility@example.org

Preferred language

English 

Organization

-