Penn membership requirements

This is documentation for easily configuring membership requirements on groups or folders. This is for immediate memberships. Groups can still be added to groups and effective memberships are not checked.

1. Ineligible members will be vetoed on add in UI or WS
2. People who are no longer eligible (i.e. not an employee anymore) will be remove immediately by change log consumer
3. Nightly a full check will be made to make sure all immediate members are eligible

Who is allowed to use this

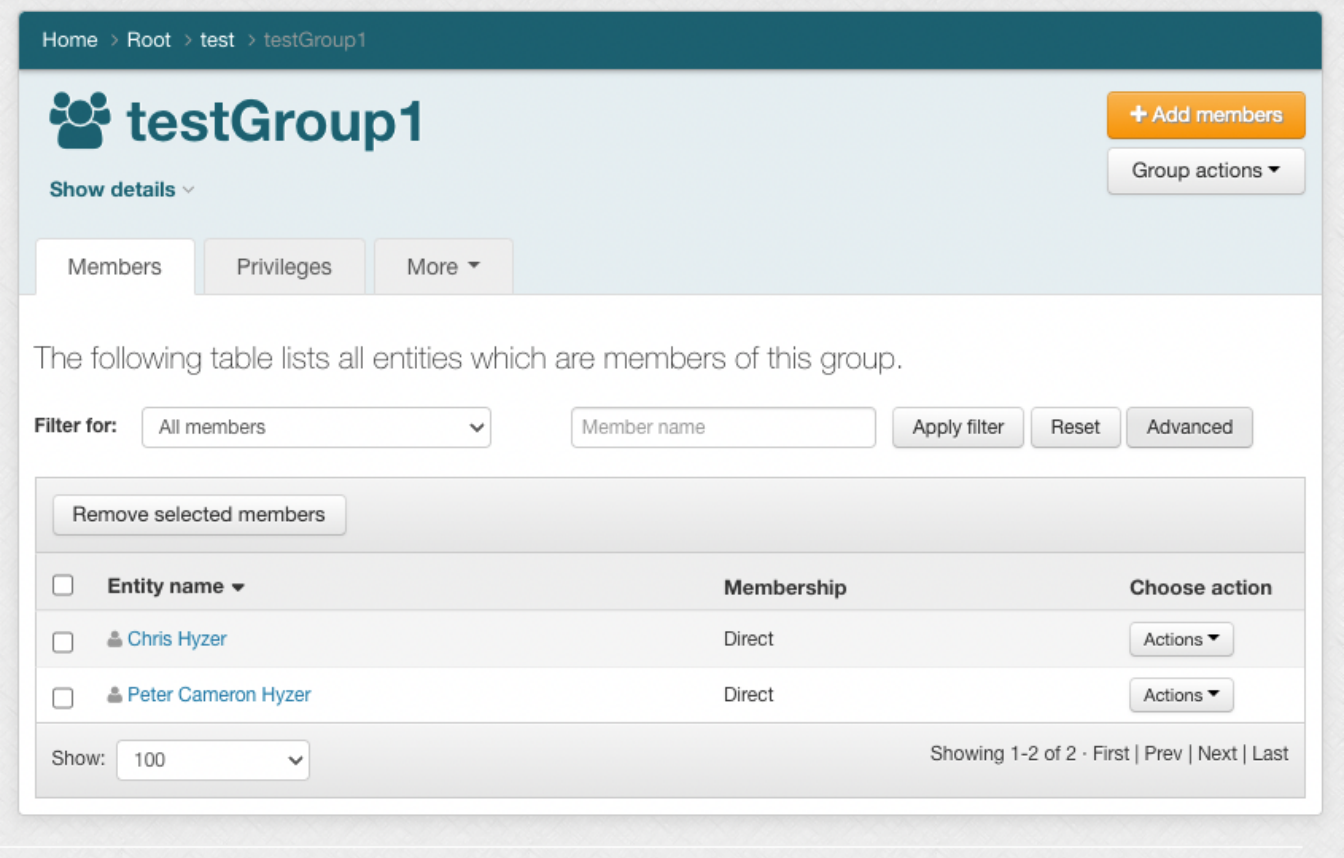
Different membership requirements can be configured by different populations. Note: any admin can assign requirements

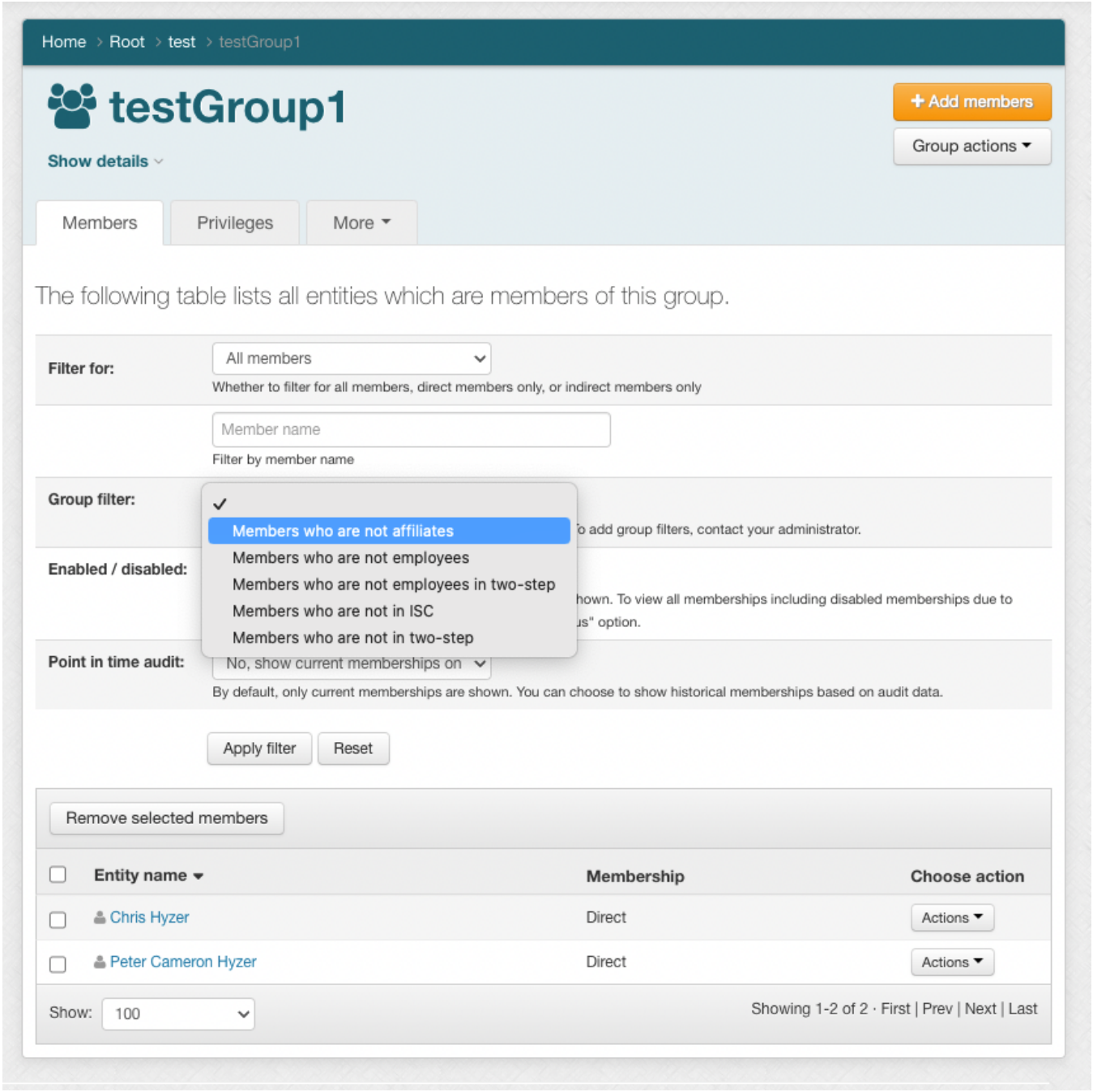
Requirement	Who can assign
Active at Penn	Power users
Penn employee	Power users
ISC (IT dept)	ISC employees
Pennant team members (Banner team)	Pennant team members

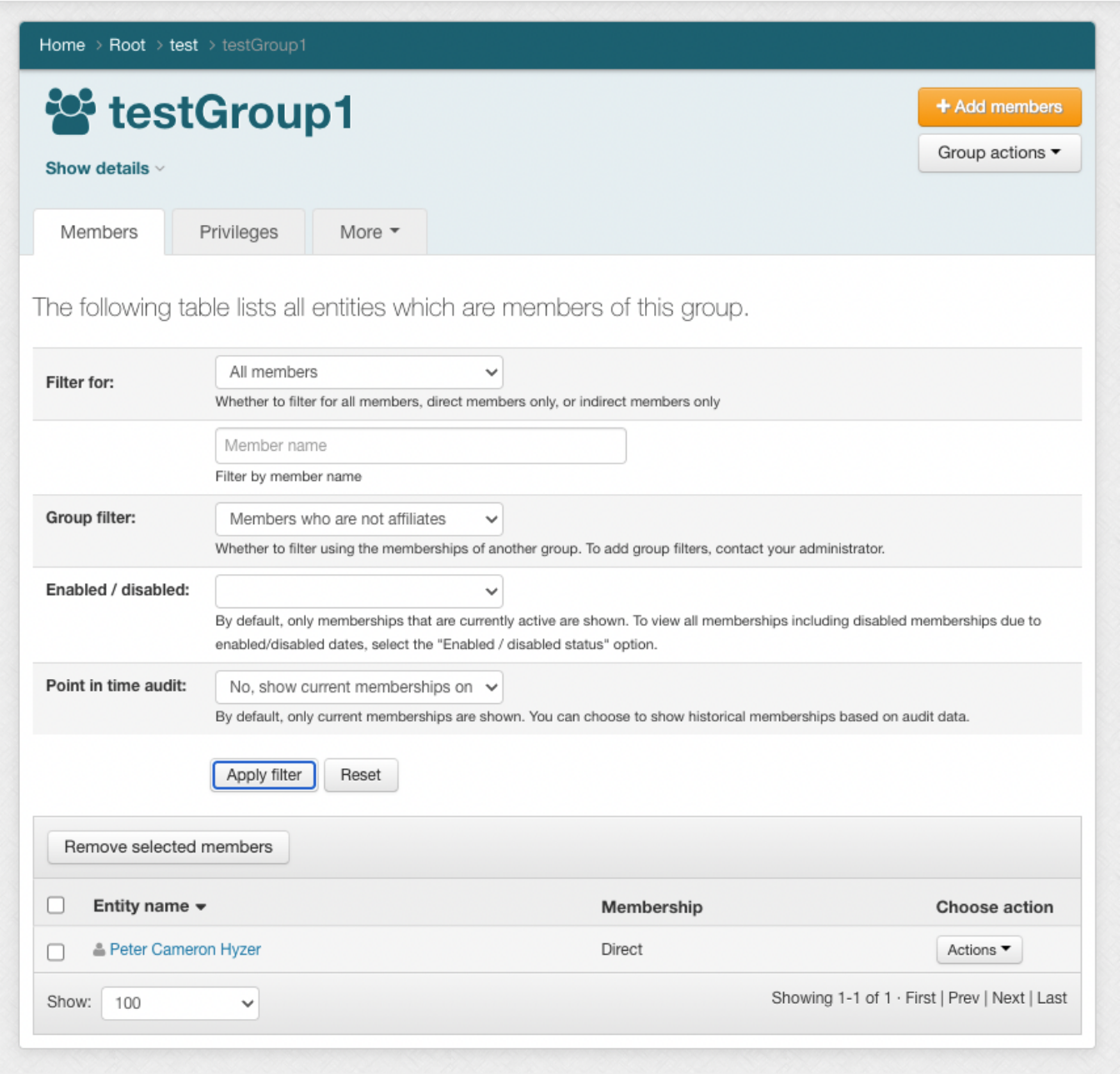
Make sure you are ready for the requirement of group

See what will change if you apply the requirement in the membership screen. **Note: ignore groups listed, those will not be removed, only other types of subjects**

Click "Advanced"



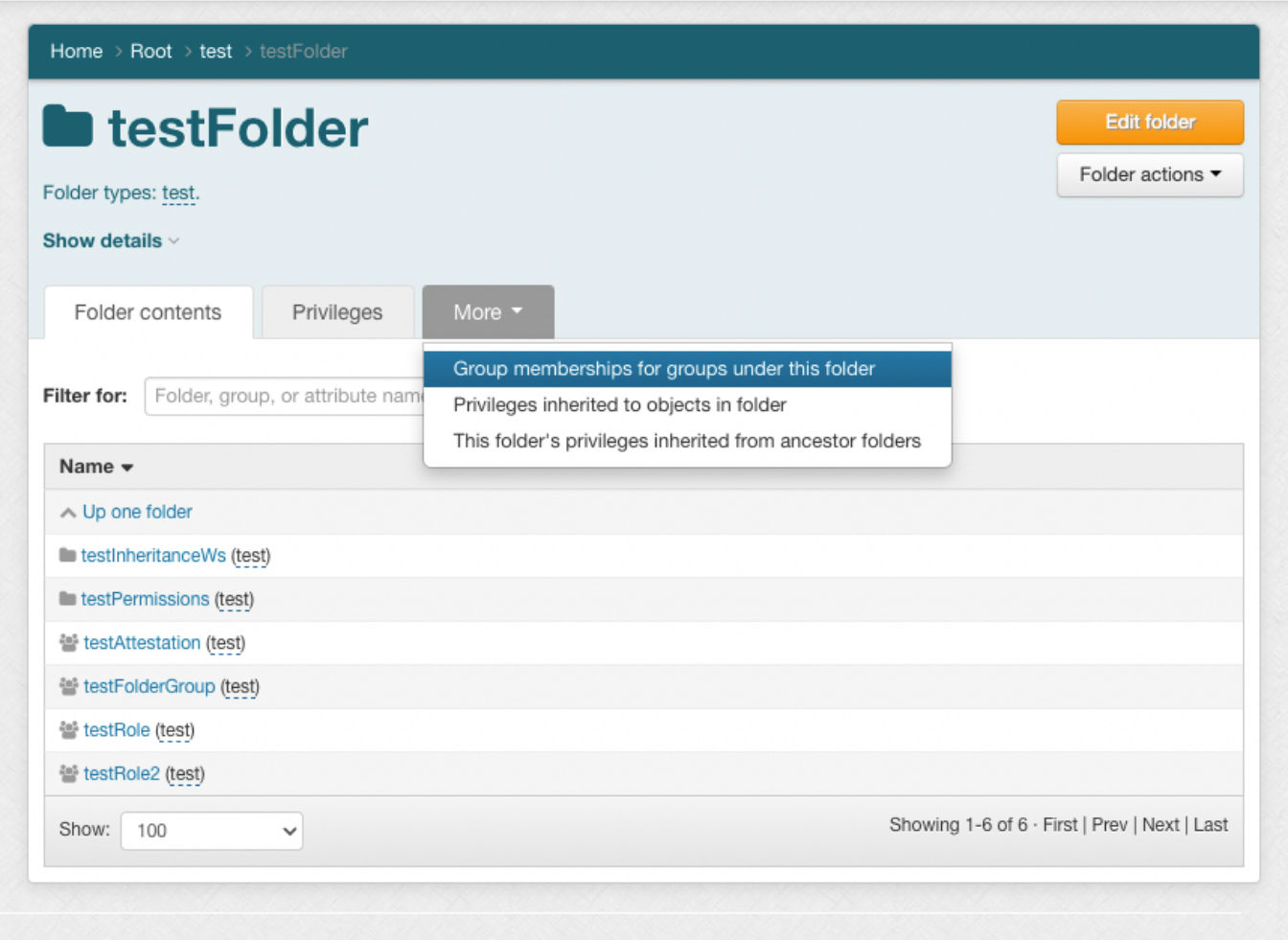

Home › Root › test › testGroup1
testGroup1
Show details
+ Add members
Group actions
Members
Privileges
More
The following table lists all entities which are members of this group.
Filter for:
All members
Whether to filter for all members, direct members only, or indirect members only
Member name
Filter by member name
Group filter:
Members who are not affiliates
Members who are not employees
Members who are not employees in two-step
Members who are not in ISC
Members who are not in two-step
o add group filters, contact your administrator.
Enabled / disabled:
hown. To view all memberships including disabled memberships due to
s" option.
Point in time audit:
No, show current memberships on
By default, only current memberships are shown. You can choose to show historical memberships based on audit data.
Apply filter
Reset
Remove selected members
Entity name
Membership
Choose action
Chris Hyzer
Direct
Actions
Peter Cameron Hyzer
Direct
Actions
Show:
100
Showing 1-2 of 2 · First | Prev | Next | Last



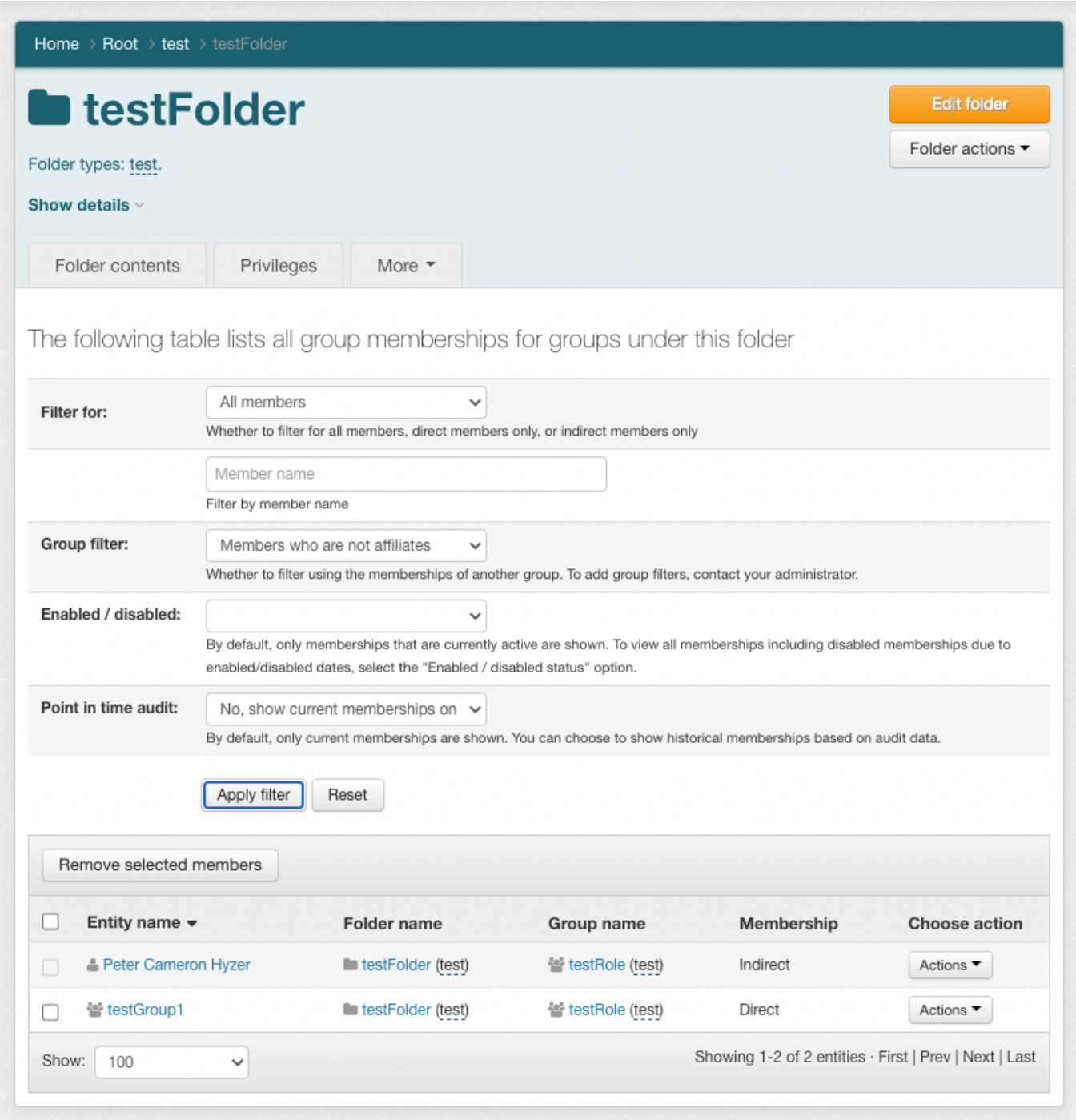
Make sure you are ready for the requirement of folder via UI

This only works if the number of ineligible memberships is not very large

Look at memberships in a folder.



Find which will be removed. **Note: ignore groups listed, those will not be removed, only other types of subjects**



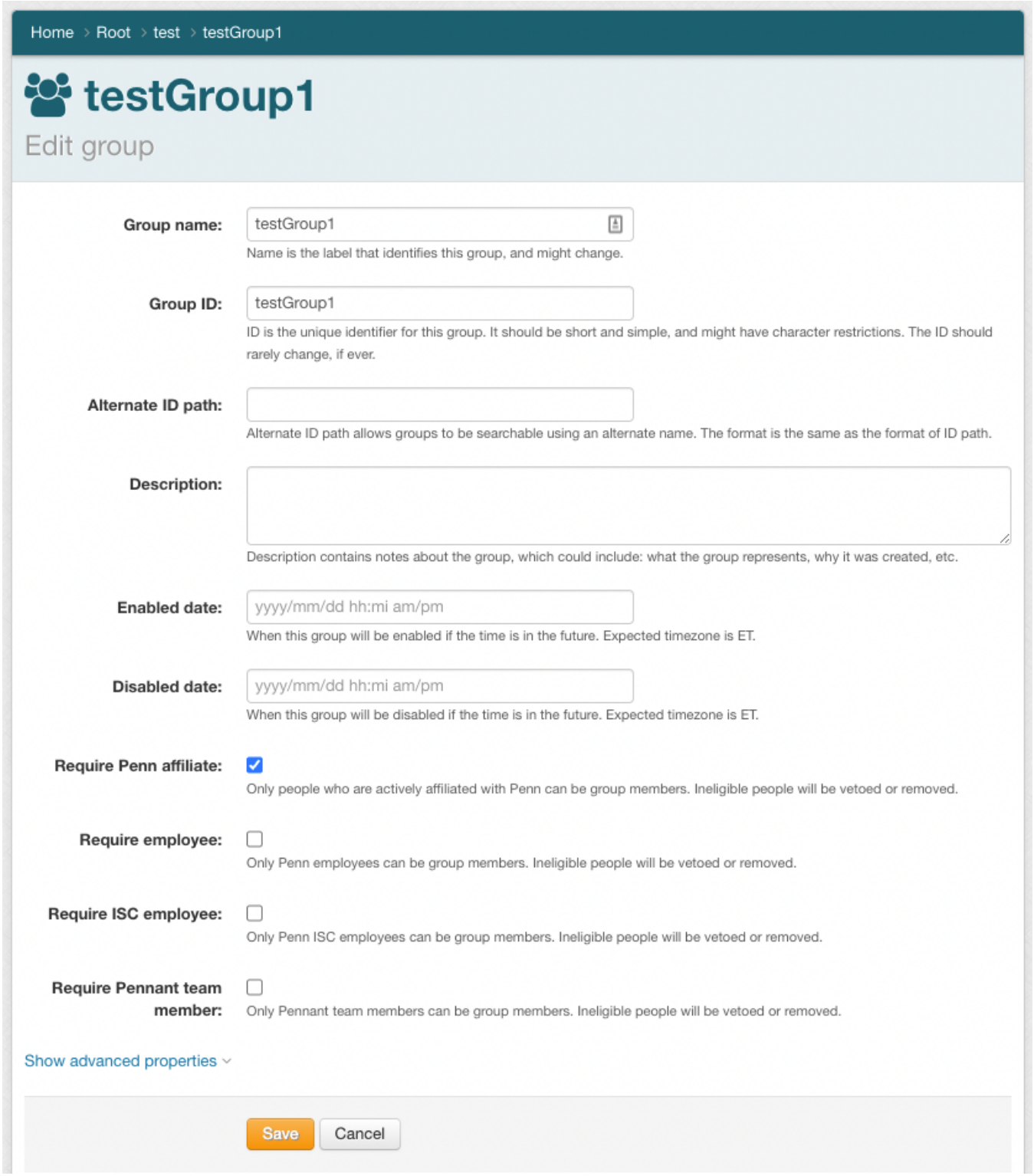
Make sure you are ready for the requirement of folder via report

Have the Grouper admin run a SQL report and export as CSV or make a Grouper report

```
select
  gmlv.group_name,
  gm.subject_id,
  gm.description
from
  grouper_memberships_lw_v gmlv,
  grouper_members gm
where
  gmlv.list_name = 'members'
  and gmlv.group_name like 'penn:isc:ait:apps:outsystems:groups:%'
  and gmlv.member_id = gm.id
  and gmlv.subject_source = 'pennperson'
  and not exists (
  select
    1
  from
    grouper_memberships_lw_v gmlv2
  where
    gmlv2.list_name = 'members'
    and gmlv2.group_name = 'penn:community:activeNonAlumniWithPennname'
    and gmlv2.member_id = gmlv.member_id)
```

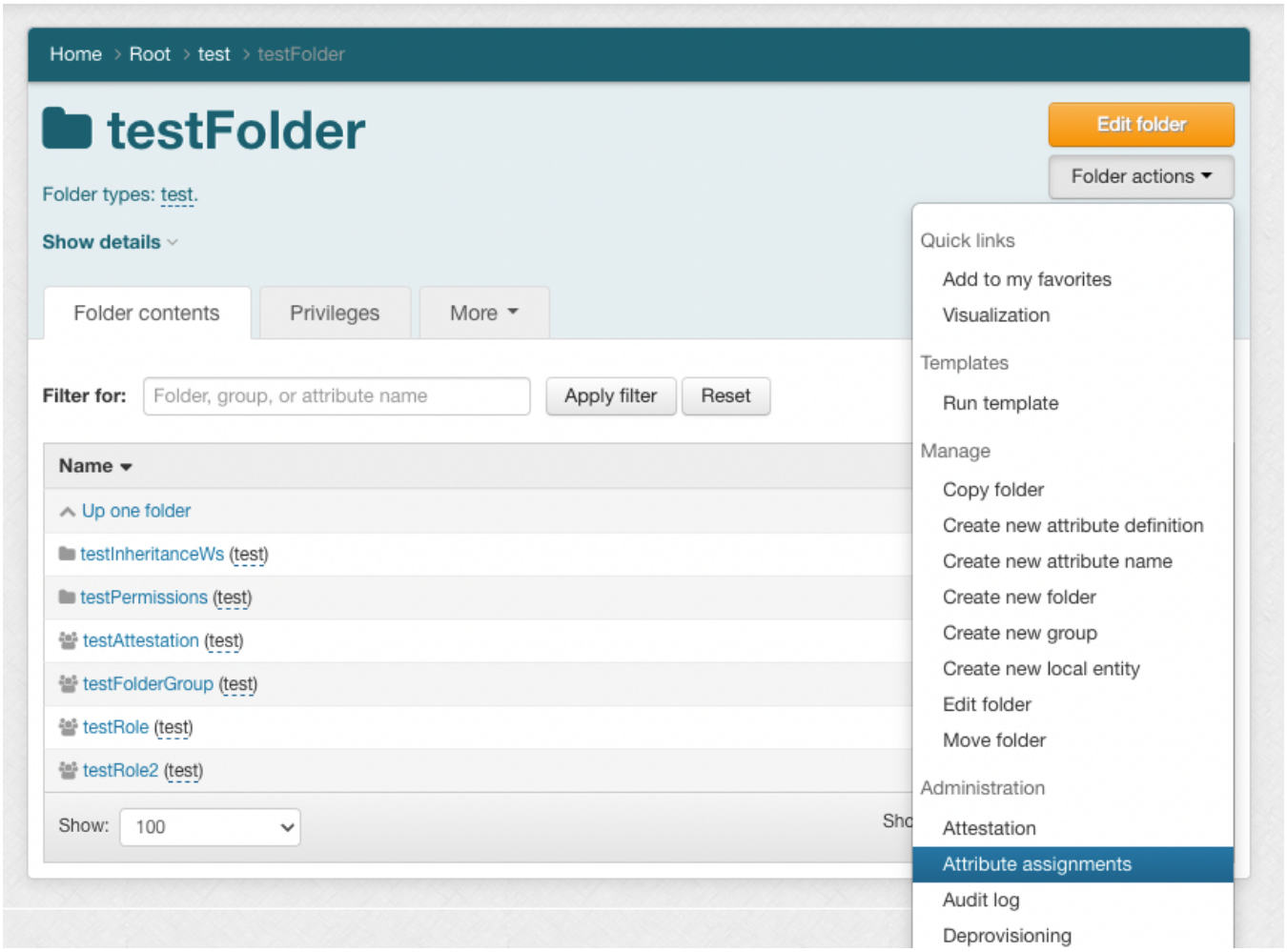
Assign a requirement to group

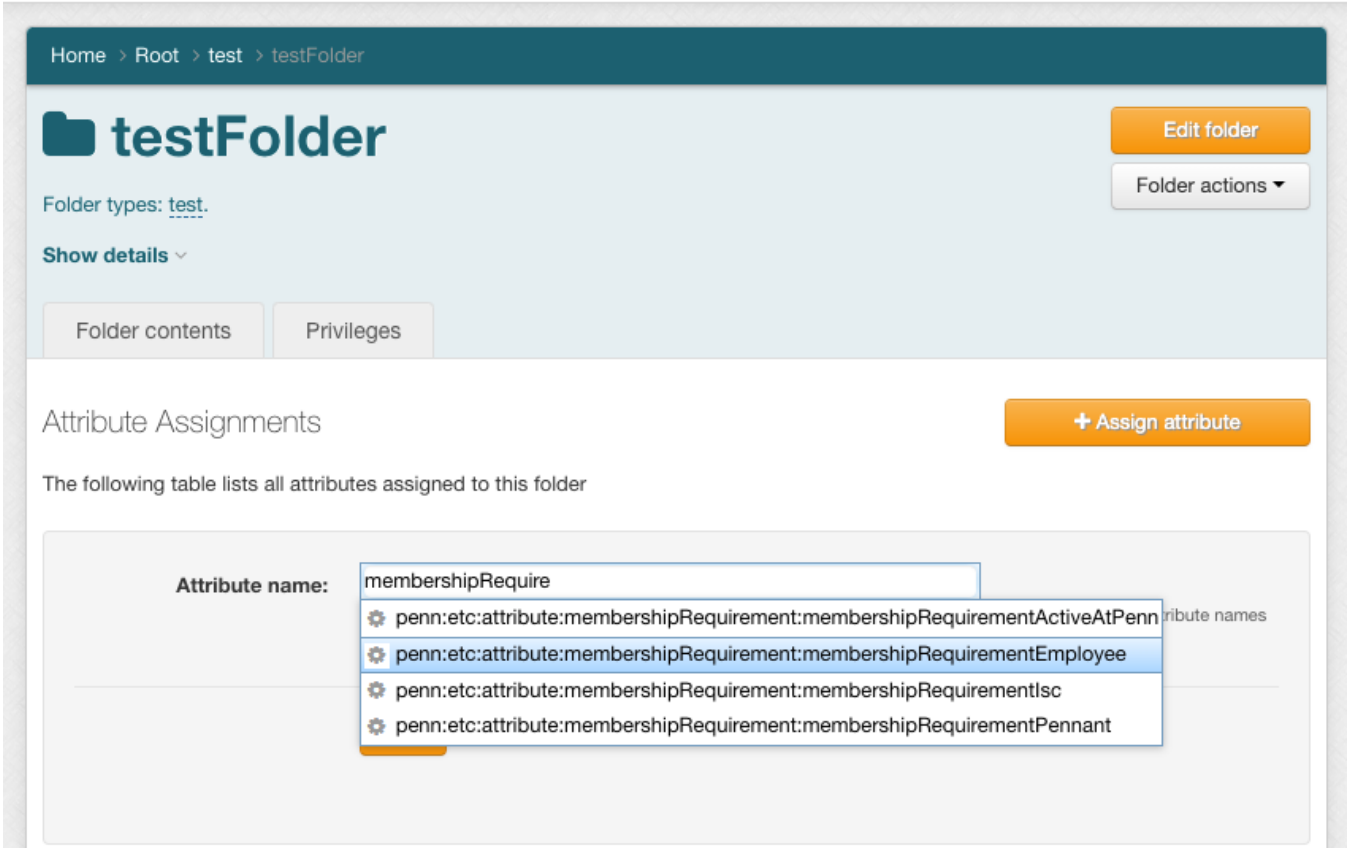
Edit the group (need to be a group admin), assign the requirement

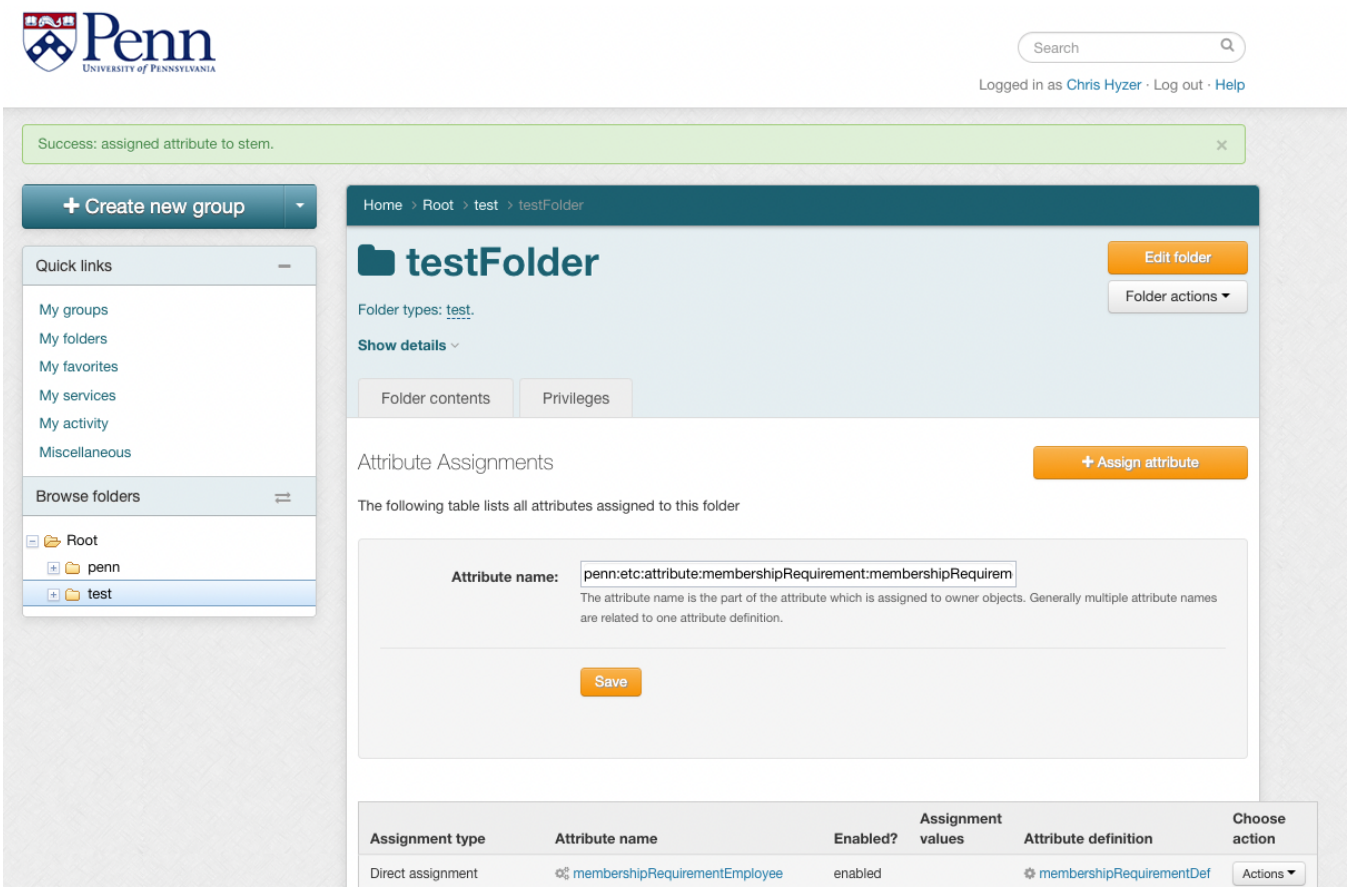


Assign a requirement to a folder

There is currently not a folder edit way to assign this, but can do with attributes (need to be a folder admin)

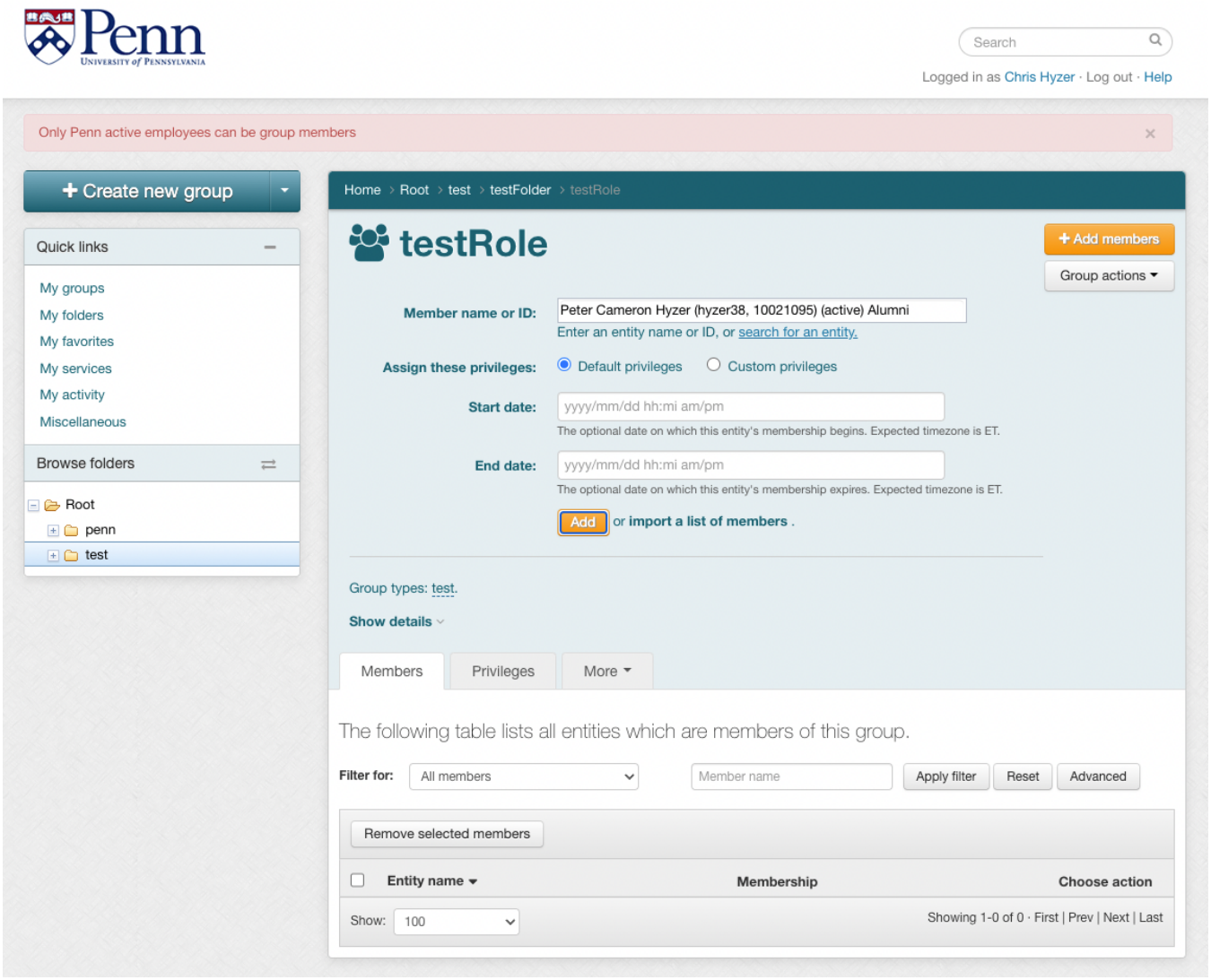

Home › Root › test › testFolder
testFolder
Edit folder
Folder actions
Folder types: test.
Show details
Folder contents
Privileges
More
Filter for:
Folder, group, or attribute name
Apply filter
Reset
Name
Up one folder
testInheritanceWs (test)
testPermissions (test)
testAttestation (test)
testFolderGroup (test)
testRole (test)
testRole2 (test)
Show:
100
Quick links
Add to my favorites
Visualization
Templates
Run template
Manage
Copy folder
Create new attribute definition
Create new attribute name
Create new folder
Create new group
Create new local entity
Edit folder
Move folder
Administration
Attestation
Attribute assignments
Audit log
Deprovisioning


Home › Root › test › testFolder
testFolder
Edit folder
Folder actions
Folder types: test.
Show details
Folder contents
Privileges
Attribute Assignments
+ Assign attribute
The following table lists all attributes assigned to this folder
Attribute name:
membershipRequire
penn:etc:attribute:membershipRequirement:membershipRequirementActiveAtPenn
penn:etc:attribute:membershipRequirement:membershipRequirementEmployee
penn:etc:attribute:membershipRequirement:membershipRequirementIsc
penn:etc:attribute:membershipRequirement:membershipRequirementPennant


Penn
University of Pennsylvania
Search
Logged in as Chris Hyzer · Log out · Help
Success: assigned attribute to stem.
+ Create new group
Quick links
My groups
My folders
My favorites
My services
My activity
Miscellaneous
Browse folders
Root
penn
test
Home › Root › test › testFolder
testFolder
Edit folder
Folder actions
Folder types: test.
Show details
Folder contents
Privileges
Attribute Assignments
+ Assign attribute
The following table lists all attributes assigned to this folder
Attribute name:
penn:etc:attribute:membershipRequirement:membershipRequirem
The attribute name is the part of the attribute which is assigned to owner objects. Generally multiple attribute names are related to one attribute definition.
Save
Assignment type
Attribute name
Enabled?
Assignment values
Attribute definition
Choose action
Direct assignment
membershipRequirementEmployee
enabled
membershipRequirementDef
Actions

Effects of adding an ineligible member by UI

The adds will be vetoed



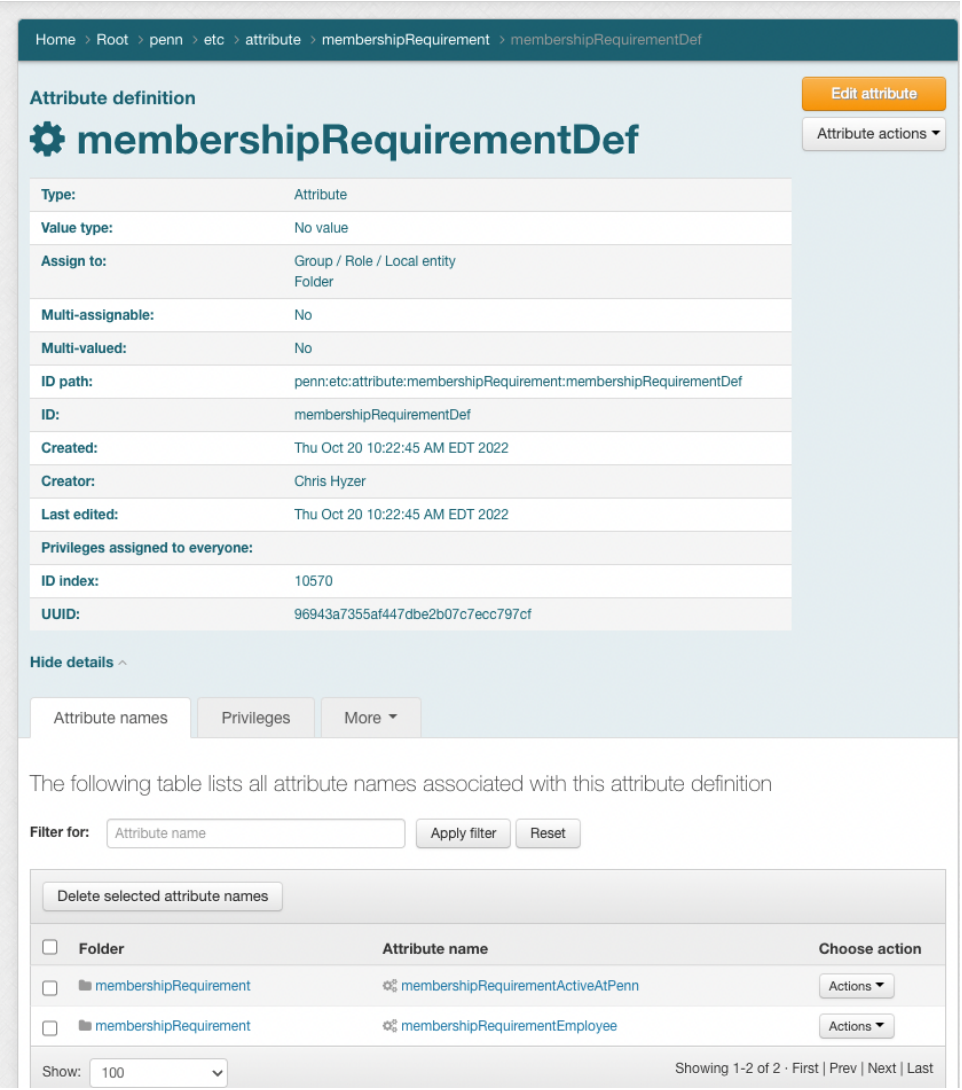
Effects of adding an ineligible member by WS

An exception will be thrown and the WS will return an error

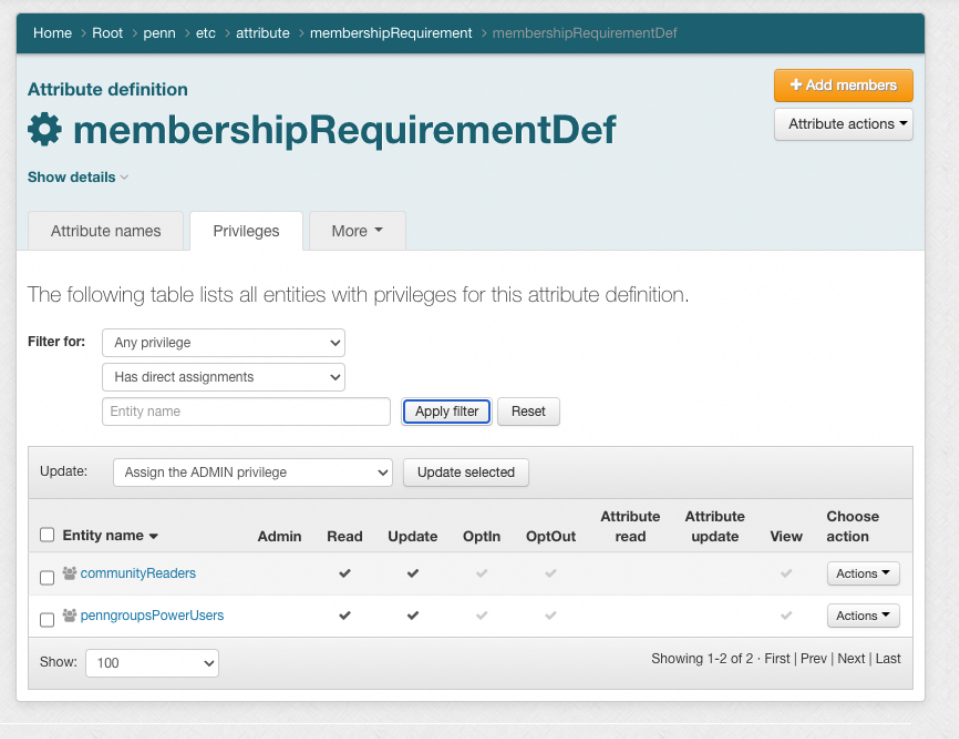
```
[mchyzer@flash pennGroupsClient-2.6.0]$ java -jar grouperClient-2.6.13.jar --operation=addMemberWs --
groupName=test:testGroup1 --subjectIds=10035755
Error with grouper client, check the logs: Bad response from web service: resultCode: PROBLEM_WITH_ASSIGNMENT,
There were 0 successes and 1 failures of users added to the group.
Error 0, result index: 0, code: EXCEPTION, message: edu.internet2.middleware.grouper.hooks.logic.HookVeto: veto.
membershipVeto.customComposite.vetoRequireActive: User is not eligible to be in this group since they are not
in: penn:community:activeNonAlumniWithPennname,
, group name: test:testGroup1, subject: Subject id: 10035755, sourceId: pennperson, field: members
        at edu.internet2.middleware.grouper.app.membershipRequire.MembershipRequireMembershipHook$1.callback
(MembershipRequireMembershipHook.java:115)
        at edu.internet2.middleware.grouper.GrouperSession.callbackGrouperSession(GrouperSession.java:1000)
        at edu.internet2.middleware.grouper.GrouperSession.internal_callbackRootGrouperSession(GrouperSession.
java:1069)
        at edu.internet2.middleware.grouper.app.membershipRequire.MembershipRequireMembershipHook.
checkMembershipEligibility(MembershipRequireMembershipHook.java:95)
```

(Grouper admin) add a new membership requirement

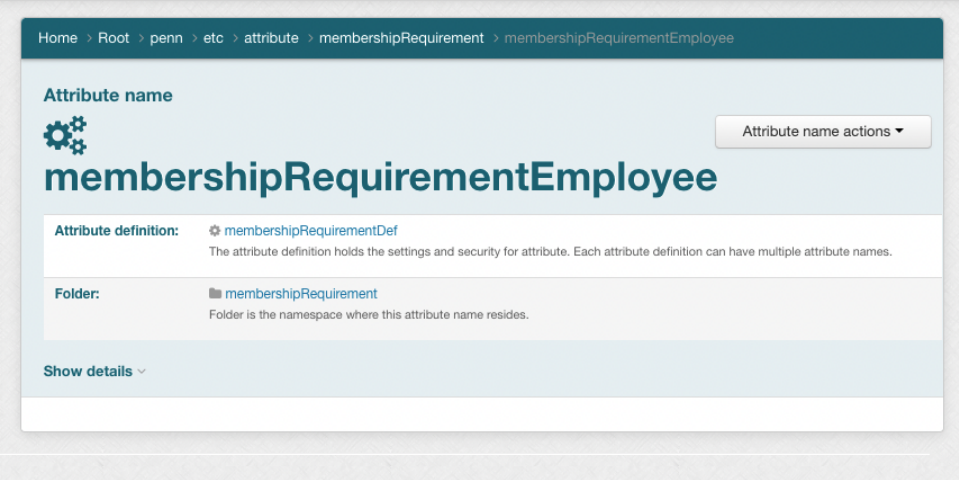
1. If the new requirement is controlled by the same population, re-use an existing attribute definition, otherwise add another one



2. Configure who can use it with attribute definition privileges

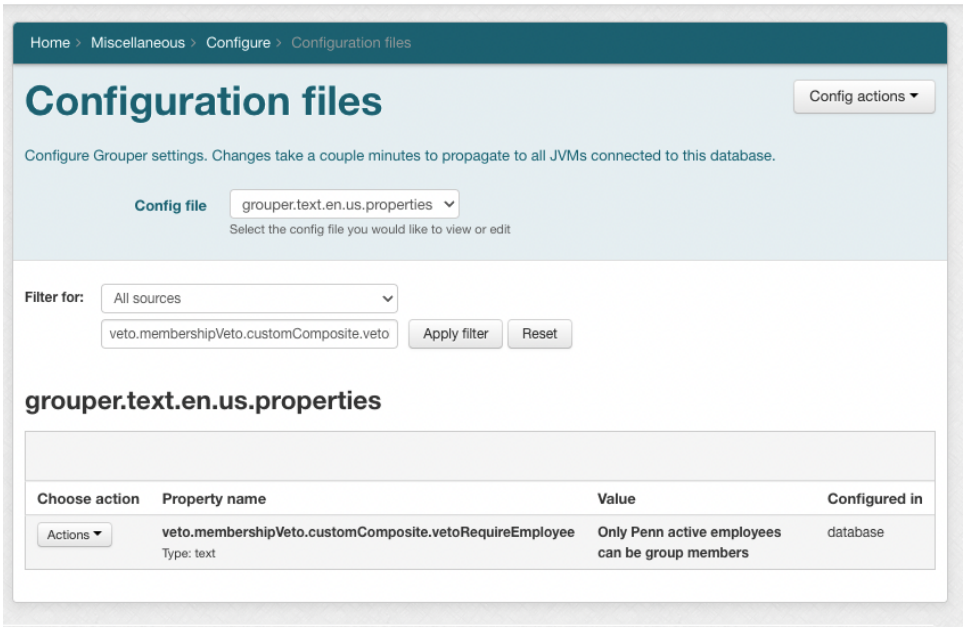


3. Create an attribute name



4. Configure externalized text for this requirement in grouper.text.en.us.properties (configured dynamically in the database)

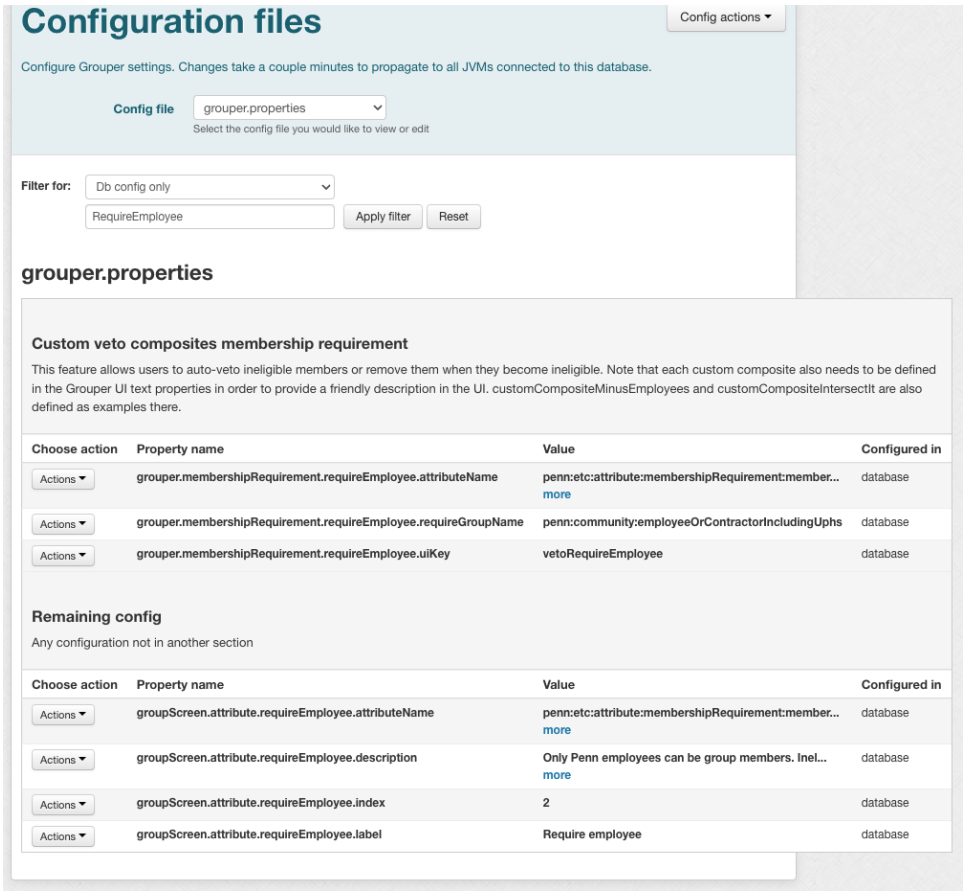
```
veto.membershipVeto.customComposite.vetoRequireEmployee = Only Penn active employees can be group members
```



5. Configure the membership requirement and group edit screen in grouper.properties (configured dynamically in the database)

```
grouper.membershipRequirement.requireEmployee.uiKey = vetoRequireEmployee
grouper.membershipRequirement.requireEmployee.attributeName = penn:etc:attribute:membershipRequirement:
membershipRequirementEmployee
grouper.membershipRequirement.requireEmployee.requireGroupName = penn:community:
employeeOrContractorIncludingUphs

groupScreen.attribute.requireEmployee.attributeName = penn:etc:attribute:membershipRequirement:
membershipRequirementEmployee
groupScreen.attribute.requireEmployee.label = Require employee
groupScreen.attribute.requireEmployee.description = Only Penn employees can be group members.
Ineligible people will be vetoed or removed.
groupScreen.attribute.requireEmployee.index = 2
```



6. Wait until caches clear (few minutes)