The Belle II
Membership Management System (B2MMS)

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DESY

- 28th B2GM
- 11 Oct 2017, KEK, Japan
Introduction

- B2MMS is part of the Belle II collaborative services (B2CS)

- It will be the unique source for:
  - mailing lists,
  - the official Belle II collaboration list,
  - the official Belle II list of authorship,
  - Belle II voting,
  - calculations of the M&O costs,
  - all other tasks which require well maintained and approved lists of users and institutions.

- B2MMS is based on the DESY IAM and interfaces to the DESY registry
- It is secure and reliable. Data are kept on non-public servers behind the DESY firewall

- Pilot phase started on 11 Sep 2017
Workflow

- All Belle II users with login credentials for B2CS are already in!
- All others please register

- Please read the docu: (!!!)
  - https://confluence.desy.de/display/BI/Belle+II
  - https://confluence.desy.de/display/BI/Belle+II+User+Registration
  - https://confluence.desy.de/display/BI/Belle+II+Membership+Management+System
Workflow (cont'd)

• As a prospective member (or a member which has simply not registered in the B2MMS yet) you should
  ▪ Fill in the registration form
    > This will create a membership request
  ▪ Remember your initial password
  ▪ Wait for your IR and possibly the IB Chair to approve your request

  ▪ New users please use your Grid user certificate if possible

• Check all fields carefully:
  ▪ Is your name correct?
  ▪ Is the Belle II Institution correct?
Membership request

Belle2 Membership Request Form

Welcome! The following form allows you to request a Belle II membership as well as credentials to access the Belle II Collaborative services and tools which are hosted at DESY.

Users who are NOT official Belle II collaboration members please choose for their membership category 'External' and the inviting Belle II institution.

The request will be forwarded to the responsible institutional representative for approval.

Member Data

Given Name *
Testperson

Family Name *
Testperson

Middle Name

Family Name Prefix

Title
Remember Password

Request for Belle2 membership was created.
As no certificate was used, your institutional representative
or his delegate has to authenticate you later on.
This will probably be done by checking your ID.

Given name: Testperson
Family name: Testperson
E-mail: dk@desy.de

Desired account name: someacc
Password: maLVG459
This is your initial password. Please remember it.
IR or IB Chair

- As a institutional representative (IR) or the institutional board chair (IB) you should
  - Check the ‘Pending Requests’ dashboard from time to time
    > You will receive e-mails about pending requests
  - Correct the data the user entered, it may be wrong
  - Approve or deny a request
    > The user will be notified via e-mail about your decision
  - An approved request will lead to a Belle II membership
    > Along with an account for Belle II Collaboration Services at DESY
Pending request notification

Dear User,

A request is waiting for approval. Please log in into the B2MMS and check your "pending requests" dashboard. (https://ias.desy.de/pls/apex/f?p=546:10:)

The following data is associated with the request:

Given Name: Testperson
Family Name: Testperson
Middle Name: -
Family Name Prefix: -
Title: -
Gender: Male
Email: dk@desy.de
Phone Home Institute: -
Phone KEK: -
Phs: -
Fax: -
Membership Category: MSc student
Institution: Test5

This is an auto-generated mail sent by the B2MMS.
Pending Requests

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Request ID</th>
<th>Action Name</th>
<th>Info</th>
<th>Approval Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test5_IR</td>
<td>4444</td>
<td>request_membership</td>
<td>Institute = Test5&lt;br&gt;Mem. Category = MSc student&lt;br&gt;E-Mail = <a href="mailto:dk@desy.de">dk@desy.de</a>&lt;br&gt;Family Name = Testperson&lt;br&gt;Given Name = Testperson</td>
<td>2</td>
</tr>
</tbody>
</table>

Check your ‘pending requests’ dashboard
Correct data, approve or deny

<table>
<thead>
<tr>
<th>Authentication</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentication</td>
<td>Person authenticated by ID</td>
</tr>
<tr>
<td></td>
<td>Other (please specify)</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Agreement</td>
<td>I hereby certify that I authenticated this person to the best of my knowledge and belief</td>
</tr>
</tbody>
</table>

Data of request

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given Name</td>
<td>Testperson</td>
</tr>
<tr>
<td>Family Name</td>
<td>Testperson</td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Family Name Prefix</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>Male</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:dk@desy.de">dk@desy.de</a></td>
</tr>
<tr>
<td>Phone Home</td>
<td></td>
</tr>
<tr>
<td>Phone Kek</td>
<td></td>
</tr>
<tr>
<td>Phs</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td></td>
</tr>
</tbody>
</table>

Correct the data if necessary and approve or deny the request.
Data of members

- Every Belle II member can look up data of another member
  - At least parts of it, not everything is visible
- Every Belle II member can change parts of his own data
  - Changes to some attributes (like the given name and family name) will create ‘change requests’ which the responsible IR needs to approve
- IRs can change the data of the users within their institution
  - An IR should always make sure that the membership data of his institution stays correct
    > To have correct M&O calculations
    > To have a correct authors list
    > ...

Search the members list

Use the search bar to quickly look up the data you need. E.g. enter ‘KEK’ to find any record containing ‘KEK’ in one of its attributes. This can be the institution name or part of an e-mail Address.
Advanced searches

Use the filter options to create more advanced searches
Change data

Change your data (or request changes to it)
Conclusions

- The B2MMS pilot phase started on 11 Sep 2017
- We have more than 700 users in the system
- All of them have DESY credentials to login
- The 98 IRs of the 106 Belle II institutions have registered
- Many of them have started to manage the members of their institutions
- It is up to all of you to make the B2MMS a success

https://confluence.desy.de/display/BI/Belle+II+Membership+Management+System