Cognos Self-Service Security Using Grouper

This document can be found on the CeDAR website, Package Custodian Only page:

https://cedar.princeton.edu/access-use-data/package-custodians-only
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cognos Self – Service Security</td>
<td>1</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>2</td>
</tr>
<tr>
<td>What is Grouper?</td>
<td>3</td>
</tr>
<tr>
<td>Package Custodian Responsibilities</td>
<td>4</td>
</tr>
<tr>
<td>Grouper Production Login</td>
<td>5</td>
</tr>
<tr>
<td>Grouper to Cognos-Changes/Updates</td>
<td>6</td>
</tr>
<tr>
<td>Capability Groups – Descriptions</td>
<td>7-8</td>
</tr>
<tr>
<td>Report Viewer Capability: Cognos-Grouper</td>
<td>9</td>
</tr>
<tr>
<td>Dashboard Story: Cognos-Grouper</td>
<td>10</td>
</tr>
<tr>
<td>Dashboard Story Author: Cognos-Grouper</td>
<td>11</td>
</tr>
<tr>
<td>Secured Groups and Folders</td>
<td>12</td>
</tr>
<tr>
<td>Cognos Folder Names Compared to Grouper</td>
<td>13</td>
</tr>
<tr>
<td>Grouper Landing Pages</td>
<td>14-15</td>
</tr>
<tr>
<td>Browse Folders on Landing Page</td>
<td>16</td>
</tr>
<tr>
<td>Browse Folders – Ref</td>
<td>17</td>
</tr>
<tr>
<td>Browse Folders – Sec</td>
<td>18</td>
</tr>
<tr>
<td>Accessing a Capability Group</td>
<td>19</td>
</tr>
<tr>
<td>Capability Group Page</td>
<td>20</td>
</tr>
<tr>
<td>Add a Member to a Group</td>
<td>21-22</td>
</tr>
<tr>
<td>View Members in a Group</td>
<td>23</td>
</tr>
<tr>
<td>Remove a Member from a Group</td>
<td>24</td>
</tr>
<tr>
<td>Search for a Member Within a Group</td>
<td>25</td>
</tr>
<tr>
<td>Access/Capability Search</td>
<td>26-27</td>
</tr>
<tr>
<td>Actions Menu</td>
<td>28</td>
</tr>
<tr>
<td>Edit, Revoke, Membership and Privileges</td>
<td>29-30</td>
</tr>
<tr>
<td>Trace Membership and Timeline</td>
<td>31-33</td>
</tr>
<tr>
<td>View Recent Activity</td>
<td>34</td>
</tr>
<tr>
<td>Favorites - Add/ Remove</td>
<td>35-36</td>
</tr>
<tr>
<td>Browse Folders – General Store (fileshare)</td>
<td>37</td>
</tr>
<tr>
<td>How Can I Get Help?</td>
<td>38</td>
</tr>
<tr>
<td>Contact CeDAR</td>
<td>39</td>
</tr>
<tr>
<td>Thank You</td>
<td>40</td>
</tr>
</tbody>
</table>
What is Grouper?

Grouper is a self-service security tool that enables Package Custodians to manage access to their Cognos secured folders and groups, using Active Directory groups.
Package Custodian Responsibilities

- Manage access to their package. With Grouper, PC’s will be able to add and remove users from all secured folders and groups, **except for the PC group**.

- Manage reports: Write reports, test, and schedule reports written by report writers; move reports within their package or between IW_PROD, IW_QA.

- Create folders to organize reports.

- Create and secure new folders/groups: Send requests to CeDAR@Princeton.edu.

- Understand and navigate through the Cognos Connection Environment.

The Package Custodian list and contact information can be found at: [https://cedar.princeton.edu/access-use-data](https://cedar.princeton.edu/access-use-data)
Grouper Production Log-in:

https://ambush.az.princeton.edu

Please log in using your own netid & (production) password.

VPN is necessary if working remotely.
Grouper to Cognos – Changes and Updates

- Any changes made in Grouper (add/removes) will be automatically updated in Cognos every 15 minutes.

- CeDAR can still make security changes, if requested.
Capability Groups

1) **Report Viewer** – this is a basic Cognos capability. The user may open, run and subscribe to reports that contain data to which they have been given access. The user may not write their own reports. They can only run reports created for them.

2) **Dashboard Story Group** – this can be considered the next level capability. This grants access to the **Dashboard** and **Story** tools.

   - Using the **Dashboard** tool, a user can create visualizations, save them, and share them with others.
   - Using the **Story** tool, a user can combine all of their dashboards into one cohesive **Story**.

   - What are Dashboards? A dashboard visually displays, measures, and analyzes multiple data sources all at once. Common Dashboards are typically interactive, provide historical & real-time data, and present all key performance indicators (KPIs) in one centralized location.
   - What is a Story? A Story is a collection of dashboards.
Capability Groups (cont’d)

3) **Dashboard Story Rpt Authoring Group** – This can be considered the third highest capability, above **Dashboard Story**. This grants access to the **Dashboard** and **Story** capabilities, as well as the capability to use the advanced report writing tool, simply called **Report**.
   - Using the **Report** tool, a user can create lists, crosstabs, visualizations and other objects into their report, save them and share them with others. They can also use the **Report** tool to create mail-merges, forms, letters, and populate Princeton listservs.

4) **Package Custodian Group** – This is the highest level capability. This grants access to the **Dashboard**, **Story** and **Report** tools, as well as manages access to the package, using **Grouper**. A **Package Custodian (PC)** is a data steward/data owner of a particular set of data and reports in Cognos. The PC can schedule any report in their package. CeDAR manages membership in this group.
Report Viewer Capability: Cognos to Grouper

Cognos

Grouper
Dashboard Story Capability: Cognos to Grouper

Cognos

New
Data

Data module

Present
Dashboard
Report
Story

Grouper

SecFldr
Dashboard Story
Dashboard Story Author
Data Module
Data Upload
Event Studio
Report Viewer
Dashboard Story **Author** Capability: Cognos to Grouper
Secured Groups and Folders

Secured folders contain reports. They are secured so that only people with special access can see the folder and run the reports inside the folder. If you want a member to have access, you must add the member to the folder group, in addition to giving them the correct capability (report viewer, report author).

If you need to create a new group or folder, email CeDAR@Princeton.edu with details, and your email will automatically generate a SN@P ticket.
Cognos Secured Folder Names Compared to Grouper Secured Folder Names

CeDAR has matched the Cognos Secured folder name to the name in Grouper whenever possible.
Create new group should not be functional. Notify us if it is. You can open the new group window, however, it should not accept any info you try to add.

**Quick Links**
quickly jump to different areas.

**Browse folders**
Navigate to your Package/Folders here!
The Grouper Home window includes:

- **Recent Activity** – Click on the Internet2 logo in the top left of your window to return to the Home > Grouper window to view your Recent Activity.

- **My favorites** – folders and groups you use most often can be added to this area.

- **Groups I manage** – the groups that you have access to are listed here.

- **My services** - This feature is not designed for users who simply want to see what they have access to. It is suggested for users to take advantage of the "Favorites" feature."
Browse Folders on Landing Page

The Browse folders section includes:

❖ Root
  ❖ PU
  ❖ Cognos
    • Ref (this is for granting capabilities and secured folder(s) access)
    • Sec (this is for viewing the package custodians)

You navigate to your packages and folders from here.
When you click on your Package a window also opens to the right, showing the folders and groups within your package.

**Capability groups specific** to the folder appear below the SecFldr:

- Dashboard Story Author
- Data Module
- Data Upload
- Dashboard Story
- Report Viewer

The ref folder may include:

- SecFldr – secured groups
- General Store
Browse Folders - Sec

The sec folder includes the list of Package Custodians in each Package.

**Note:** All Package Custodian changes are made by CeDAR.
Accessing a Capability Group

Path: ROOT > PU > COGNOS > ref > Training Data

1) Click on the folder under ref to open it. A window opens to the right showing you the folders and capabilities within it.

Your package may contain one or more of the following Capability Groups:

❖ Dashboard Story Author
❖ Dashboard Story
❖ Report Viewer

You may or may not see Data Module and Data Upload

Click on a Capability Group to view the members within it.
Capability Group Page

1) Group members are listed alphabetically by first name.

Page Bottom

2) You can scroll down to view the first 50 members. You can adjust this setting in the Show window at the page bottom.

3) You can move to different pages, using the buttons at the bottom of the page.
Add a Member to a Group

Click the Add members button in the top right of the window to open the Add a Member window.

1) First you add the member to the capability group (i.e. report viewer, report author)
2) If there are secured groups you need to then add the member to the secured group(s) for them to access the data within the secured group(s).
Add a Member Window

1) Begin typing the netID of the member you want to add. Possible choices will begin to populate in a window near the line that meet your criteria. Select the netID you are seeking. You can also hover over the netID, and a tool tip will provide the name and email address of the netID. This is a good way to check that you are adding the correct person.

2) Start and End dates are optional fields. You may use this field if you find this additional information useful to add. i.e. if you have contract employees and want to keep track of their Start and End dates.

3) Click the orange Add button in the bottom of the window when ready to accept your changes.

Note: You will see a green message above the window indicating that your user was successfully added.
View Members

You can immediately view the member that has just been added in the member list.

If the list is long you can scroll down in this window to verify that your new member has been added to the group.

If the list is very long you can add the member Last Name to the Filter for field. Select apply filter to view only the member.
Remove a Member from a Group

1) Navigate to the name of the member you want to remove.
2) Click the box to the left of the Member name to select the user.
3) Click Remove selected members button.

The change is immediate, and cannot be undone in Grouper.
You can add the member back to the group, if needed.

Note: You will see a message indicating that your user was successfully removed.

Note: A process runs several times an hour to update Cognos, with changes made in Grouper.
Use the **Filter for** functionality to search for a member within a group. This is helpful if your group is a large one.

1) **Enter the netid** into the search window.

2) **Select Apply filter.**

3) If a member matches the criteria the entity name will appear in the area below the search window.
Access/Capability Search

If you need to add a member with a similar access/capability as an existing member, it is easy to get that information.

1) Find the existing member within their Capability group (i.e. Report Viewer).

2) Click on the member name.
Access/Capability Search (cont’d)

The member window opens.

You will see a list of Folders and Group names that the member is in.
**Actions Menu**

In the *Actions* menu you can:

1) Edit membership and privileges
2) Revoke membership
3) Trace membership
Edit Membership and Privileges

This window contains:

1) Unique ID: PU employee ID number.
2) Email: Email address
3) Name: netID
4) Description: Email address, PU ID number
5) Start and End Dates: These fields are available if Package Custodian would like to use them to track employee start/end dates. i.e. May be useful for managing contract employees.

Remember to Save any changes made in this window.

Indirect Member: Indirect membership means the user is a member of another group that is a member of this group. The group that contains indirect members is listed among the members; click its name to see its members. This feature is not in use at PU presently.
Revoke Membership

You can remove a member from a group in 2 ways in this window. Select the entity name you want removed, by checking the box on the left.

1) Remove selected members button

1) Revoke membership button in the Actions menu.

The change is immediate, and cannot be undone in Grouper. You can add the member back to the group, if needed.

Note: You will see a message indicating that your user was successfully removed.
Trace Membership – Search

Under the **Actions** button use the **Trace membership** functionality to see all the groups a person is in, and other details.

1) Go to the **Capability** group (i.e. Report Viewer) for the member.

2) Find the member.

3) Check the box to select the member.

4) Open the **Actions** window to the right and select **Trace membership** from the pull-down menu.
Trace Membership Search (cont’d)

A new window opens where you can view:

1) Member type (i.e. direct member)
2) Path to the group the member is in.
3) Membership timeline.

In the membership timeline you can check the box to view:

1) Show user audit
2) Show point in time audit
3) Show provisioning events

All 3 options are checked by default.
Trace Membership- Show Timeline

If you click the **Show timeline** button below the **Audit** options, details appear, chronologically by session.

Here you can identify the member's **capability** and the secured folders the member is in.

You can view past actions on the member including:

1) **Date and time of action**
2) **Adds/removes with details**
3) **State**: indicates if the subject was a member of each of the groups in the membership path at the time. The **Green circle with check** to indicate membership. **Red X** if removed.
View Recent Activity

Recent Activity: You can view changes to your folders or groups in this window.

1) Click on the Internet2 logo in the top left of your window and the Home > Grouper window will open to show your Recent Activity.

<table>
<thead>
<tr>
<th>Recent activity</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added vitraille as a member of the Report Viewer group.</td>
<td>2023/02/23 11:33 AM</td>
</tr>
</tbody>
</table>
Add Favorites

You can add Favorites to your Landing Page, Recent Activity window.

1) When you are in a window that you want to add to Favorites, open the Folder actions pull-down menu in the top right of your window.
2) Select Add to my favorites. A message indicating the folder was added will appear briefly in the top of your window.

This is a toggle button, so you click once to add or remove from Favorites.
Remove Favorites

You can remove Favorites from your Landing Page, Recent Activity window.

1) Go to the window that you want to remove from Favorites.

2) Open the Folder actions pull-down menu in the top right of your window.

3) Select Remove from my favorites. A message indicating the folder was removed will appear briefly in the top of your window.

Folder was removed from favorites
If you use a file share directory, CeDAR’s “General Store” the group(s) can be found in the General Store.

The HR General Store folder includes:
How Can I Get Help?

1)  Grouper Questions
Open a Service Now incident directed to the Grouper IAM Group.

❖ Can’t log onto Grouper
❖ Can’t see all your folders and groups
❖ Can’t modify your groups (add, remove users)
❖ Can’t find a user to add to Grouper

2)  Cognos Questions
❖ I gave a user access, and they can’t log in to Cognos.
❖ I can run a report, but don’t see any data.

Open a Service Now – SAS form.
Service Now - SAS form
Contact CeDAR

Open a Service Now ticket.

**Service Now - SAS form**

On the form start typing Cognos Info Warehouse. 2 choices will appear. Select **COGNOS**.

The second question will ask you to select the type of help you need.

When submitted this ticket will be sent to all CeDAR staff.

**Best Practice**: bookmark this location the first time you use the link, so you can return to it, as needed.
Thank You!