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
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What has Happened?

- LDAP authorization is retired and Active Directory (AD) authorization was implemented.
- Package Custodians will manage Cognos security, using Grouper.

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 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
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 10 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” tool and also to the “Story” tool.
   - 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 the dashboards they created into a story. A “Story” is a combination of multiple dashboards into a one cohesive piece, a “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.
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 put lists, crosstabs, visualizations and other objects into their report, save it and share it 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 manage access to the package using Grouper. A package custodian is a data steward or a data owner of their data and reports in Cognos. They can schedule any report in their package.
Report Viewer Capability: Cognos to Grouper

Cognos

The Princeton Information Warehouse: Production

- Home
- Search
- My content

Training Data
4/19/2019 1:20 PM

Training Data - Reports
9/29/2022 5:48 PM

Grouper

Training Data
SecFldr
- Cognos Analytics Class Reports
- Dashboard Story Author
- Data Module
- Data Upload

Report Viewer
Dashboard Story Capability: Cognos to Grouper

Cognos

- Dashboard
- Report
- Story
- Job
- Other
- New

Grouper

- SecFlr
- Dashboard Story
- Dashboard Story Author
- Data Module
- Data Upload
- Event Studio
- Report Viewer
Dashboard Story Author Capability: Cognos to Grouper

Cognos

Grouper

- Upload files
- Data module
- Dashboard
- Report
- Story
- Job
- Other

- Training Data
- SecFldr
- Cognos Analytics Class Reports
- Dashboard Story Author
- Data Module
- Data Upload
- Report Viewer
Secured Groups and Folders

Secured folders are folders which contain reports. They can be secured so that only people with special access can see the folder and run the reports inside.

If you need a new group or folder, email CeDAR@Princeton.edu with details and a SN@P ticket will be generated.
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.

Cognos

- Benefits
  2/10/2022 2:42 PM
- DOF
  10/27/2022 2:55 PM
- DOF Dept Administrator Rpts
  5/10/2018 11:18 AM
- DOF Listserv Reports
  8/11/2022 10:19 AM
- HR
  5/13/2022 11:00 AM
- HR Absence Management Dept Rpts
  9/14/2021 3:39 PM
- HR Dept Administrator Rpts
  7/7/2020 9:37 AM
- HR Dept Manager Rpts
  8/8/2022 2:29 PM

Grouper

- SecFldr
- Benefits
- DOF
- DOF Dept Administrator Rpts
- DOF Listserv Reports
- HR
- HR Absence Mgmt Dept Rpts
- HR Dept Administrator Rpts
- HR Dept Manager Rpts
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.

Browse folders
Navigate to your Package/Folders here!

Quick Links quickly jump to different areas.
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."
The Browse folders section includes:

- **Root**
  - **PU**
  - **Cognos**
    - **Ref** *(this is for granting capabilities and secured folders)*
    - **Sec** *(this is for seeing who are 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
- Dashboard Story
- Report Viewer

The ref folder includes:

- SecFldr – secured groups
- General Store
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.
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.

Showing 1-50 of 544 · First | Prev | Next | Last
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.
Add a Member Window

1) Type the netID of the member you want to add. Select the Enter key on your keyboard. You can also hover over the netID, and a tool tip will give you the name and email address. 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.

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

Note: You will see a 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 name to the filter 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 every 10 minutes to update Cognos, with changes recently made in Grouper.
Search for a Member Within a Group

Using the Filter for functionality you can 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.

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. Not in use at PU presently.
Revoke Membership

You can remove a member from a group in 2 ways in this window:

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.

Success: entity was removed from the group
Trace Membership – Search

Use the Trace functionality to see all the groups a person is in, as well as 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** is checked to indicate membership. **Red X** if removed.

---

The following are times when the subject was added or removed from any of the groups in the membership path above. The events include all membership adds and removes for the subject around the time. And the state includes whether the subject was a member of each of the groups in the membership path at that time.

- **2023/03/13 12:14:27 PM**
  - Event(s)
    - 2023/03/13 12:14:25 PM - [point in time audit] added vittare to PU : COGNOS : ref: Training Data : Report Viewer group
  - **State**
    - PU : COGNOS : ref: Training Data : Report Viewer

- **2023/02/27 1:42:33 PM**
  - Event(s)
    - 2023/02/27 1:41:08 PM - [point in time audit] added vittare to PU : COGNOS : ref: Training Data : Report Viewer group
    - 2023/02/27 1:41:08 PM - [user audit] Leah N. Targon added vittare to PU : COGNOS : ref: Training Data : Report Viewer group using Web user interface
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.
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, the CeDAR’s “General Store” the group(s) can be found in the General Store.

The General Store folder includes:

- Human Resources
  - General Store
    - CISDR
    - DOF Tableau
    - HR
How Can I Get Help?

1) Grouper Questions
   Contact Keith Martin (keith.martin@Princeton.edu) with questions/concerns
   - 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
   Email CeDAR@Princeton.edu with details and screen shots of your issue.
   A SN@P ticket will be automatically opened.
   - I gave a user access, and they can’t log in to Cognos.
   - I can run a report, but don’t see any data.
Thank You!