

Use case of Grouper integration with Qualtrics

| | | | | | |
|---------------------------|---|--------------------------------|--|---|--|
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Qualtrics is a survey tool. Penn has certain groups of people who have access to qualtrics. Qualtrics is a sponsored partner (SP) in the [InCommon Federation](#), so sending SAML assertions of eduPersonEntitlement with group names is fine.

The Grouper Qualtrics integration is also covered on [pages 7-8 of these slides](#)

This effort took 4 main parties at Penn:

- the overseer who is managing the effort, working with the schools, and interfacing with Qualtrics
- data admin to write the warehouse queries
- grouper admin to setup the groups/loader
- shib admin to configure shib

Steps to make this work:

- Create the overall groups in one folder, for groups which are sourced from the loader, allow additional ad hoc members by separating the overall group, and the system of record group




The screenshot shows the Grouper web interface. At the top, there's a header with 'PENNSYLVANIA' and a welcome message 'Welcome Michael Christopher Hy:'. Below this is a navigation bar with 'EXPLORE' and 'Browse groups hierarchy'. A sub-header says 'Browse or list groups'. The 'Current location' is 'Root: penn: [redacted] apps: qualtrics'. A list of groups is shown, including 'qualtricsBsd', 'qualtricsBsd_systemOfRecord', 'qualtricsDental', 'qualtricsDental_systemOfRecord', 'qualtricsDesign', 'qualtricsDesign_systemOfRecord', 'qualtricsGse', 'qualtricsGse_systemOfRecord', 'qualtricsLaw', 'qualtricsLaw_systemOfRecord', 'qualtricsNursing', 'qualtricsNursing_systemOfRecord', 'qualtricsSas', 'qualtricsSas_systemOfRecord', 'qualtricsSeas', 'qualtricsWharton', and 'qualtricsWharton_systemOfRecord'. At the bottom, there's a 'Search groups' section with a search bar and a 'Search groups' button.

- Add each system of record group to each overall group

EXPLORE

Members

Current location is

 Root:  penn:  apps:  qualtrics:  **qualtricsBsd**

Membership list

- ☒ Show DIRECT members of this group
- ☐ Show INDIRECT members of this group
- ☐ Show ALL members of this group (direct and indirect)

Change display

Enter search text to find members in the list:

Search for members

First name ▾

Change sort attribute

- ☐ **qualtricsBsd_systemOfRecord** is a direct member

Remove selected members**Remove all members**[Add members](#) [Create composite group](#) [Back to group summary](#)

3. Our shibboleth integration is based on the kerberos principal that reads memberships from Grouper. It will send all groups in that folder that it can read, which means only the overall groups. Set this privilege:

EXPLORE

Current entities with [READ] privilege

Current location is

Root: penn: apps: qualtrics: qualtricsBsd

Entity list filtered by privilege

Show entities with READ privilege

- businessServicesAdmins : has direct privileges
- grouper/shit : has direct privileges
- Ma (active) Temporary Staff - Not Specified : has indirect privileges



[Assign this privilege to more entities](#) [Back to group summary](#)

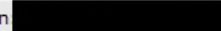



4. For the loader groups, make a view against the warehouse:

| Columns | Script | Data | Grants | Synonyms | Deps (Uses) | Deps (Used by) | Triggers | Errors | Auditing |
|---------|--|------|--------|----------|-------------|----------------|----------|--------|----------|
| 1 | /* Formatted on 1/20/2012 5:26:48 PM by SQL Developer 1008.3004 */ | | | | | | | | |
| 2 | CREATE OR REPLACE FORCE VIEW AUTH | | | | | | | | |
| 3 | (| | | | | | | | |
| 4 | PENN_ID | | | | | | | | |
| 5 |) | | | | | | | | |
| 6 | AS | | | | | | | | |
| 7 | SELECT | | | | | | | | |
| 8 | FROM | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | WHERE | | | | | | | | |
| 13 | | | | | | | | | |
| 14 | | | | | | | | | |
| 15 | | | | | | | | | |
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| 23 | | | | | | | | | |
| 24 | COMMENT | | | | | | | | |
| 25 | | | | | | | | | |

5. Setup the loader attributes for system of record groups. This will be a daily job run each morning

Group summary ⓘ

Current location is  apps: qualtrics:  qualtricsBsd_systemOfRecord

| | |
|--------------------------|---|
| <u>Name</u> | qualtricsBsd_systemOfRecord |
| <u>Path</u> | penn:  apps: qualtrics: qualtricsBsd_systemOfRecord |
| <u>Description</u> | loader group for business services qualtrics users |
| <u>ID</u> | qualtricsBsd_systemOfRecord |
| <u>ID Path</u> | penn:  apps: qualtrics: qualtricsBsd_systemOfRecord |
| <u>Alternate ID Path</u> | |
| <u>UUID</u> | 712  6e |
| <u>Types</u> | <div> <div>grouperLoader</div> <div>base</div> </div> <div> <div>grouperLoaderAndGroups</div> <div>grouperLoaderDbName</div> <div>grouperLoaderGroupQuery</div> <div>grouperLoaderGroupTypes</div> <div>grouperLoaderGroupsLike</div> <div>grouperLoaderIntervalSeconds</div> <div>grouperLoaderPriority</div> <div>grouperLoaderQuartzCron</div> <div>grouperLoaderQuery</div> <div>grouperLoaderScheduleType</div> <div>grouperLoaderType</div> <div>members <i>List field</i></div> </div> <div> <div>warehouse</div> <div>0 28 8 * * ?</div> <div>select distinct penn_id as subject_id from AT  SD_V</div> <div>CRON</div> <div>SQL_SIMPLE</div> </div> |

Show entities with ADMIN ▼ privilege

6. We don't have a requirement for this yet, but you could give someone UPDATE privileges on the overall group to manage the ad hocs

7. Bounce the loader process, and optionally kick off the jobs manually from GSH to get them loaded immediately

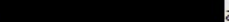
```
grouperSession = GrouperSession.startRootSession();
loaderGroup = GroupFinder.findByName(grouperSession, "stem:group_systemOfRecord");
loaderRunOneJob(loaderGroup);
```

8. For the non-loader overall group, add the groups where data comes from, which in this case is one group from a school which includes groups they already manage of certain employees. This comes from their folder so they can already manage that group, not the folder where the qualtrics groups are:

Group membership update lite

Group

Current location is:  penn:   apps:  qualtrics:  qualtricsSeas [Find a group](#) [Admin UI](#) [Lite](#)

| | |
|-------------|--|
| Name | qualtricsSeas |
| Path | penn:  apps:qualtrics:qualtricsSeas |
| Description | People from seas allowed to use qualtrics |

[Advanced features](#)


Add member

Enter search text to find a member to add

Add member

Membership list

Sort by: First name ▾ Showing group members: 1-1 of 1 page size: 100 ▾

  qualtricsUsers ▾

 penn:qualtricsUsers

Result page: 1

9. Configure and test the shibboleth, something like this

```
<!-- Attribute Release Policy for Qualtrics -->
<AttributeFilterPolicy id="afp_releaseEntitlementsToQualtrics">
  <PolicyRequirementRule xsi:type="basic:OR">

    <basic:Rule xsi:type="basic:AttributeRequesterString"
      value="https://whatever.qualtrics.com/WRSAML/entityId1" />
    <basic:Rule xsi:type="basic:AttributeRequesterString"
      value=" https://whatever.qualtrics.com/WRSAML/entityId2" />

  </PolicyRequirementRule>
  <AttributeRule attributeID="eduPersonEntitlement">
    <PermitValueRule xsi:type="basic:AttributeValueRegex"
      attributeID="eduPersonEntitlement"
      regex="^urn:mace:school[.]edu:schoolName:grouperPath:apps:qualtrics:.*$"
    </PermitValueRule>
  </AttributeRule>
</AttributeFilterPolicy>
```

10. Communicate the format of the entitlements to Qualtrics, so they can configure their side:

```
urn:mace:school.edu:folderInGrouper:apps:qualtrics:qualtricsBsd
```

sdf