



Enterprise Policy Management

SharePoint Integration Guide

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Overview

This document provides step-by-step guidance for integrating Rsam's Enterprise Policy Management (EPM) Module with Microsoft SharePoint. This integration enables policy documents developed and published in Rsam to be automatically uploaded to SharePoint sites; allowing customers to manage documents directly from Rsam without switching between Rsam and SharePoint. This integration is especially useful to policy organizations that frequently update policies and want the revised policy documents to be available quickly across the organization through SharePoint.

The integration provides the following benefits:

- Policy drafting, review, and approval processes in Rsam automatically trigger publication updates to SharePoint.
- Save time by avoiding the manual effort of copying policies from Rsam to SharePoint
- Schedule periodic updates to the SharePoint server using the Rsam Scheduler

The out-of-the-box EPM module already contains all of the fundamental components necessary for enabling EPM-to-SharePoint document transfers. This document assists in completing the configuration to support your specific environment.

Prerequisites

This section contains the prerequisites for integrating the Rsam EPM Module with Microsoft SharePoint.

- Rsam version 9.2.2130.X or above.
- Microsoft SharePoint version 2013 or above.
- The base URL of SharePoint portal.
- The user name and password of the SharePoint portal.
- The domain name of the SharePoint server.
- The folder/subsite details to which the document will be uploaded on the SharePoint Server.
- Rsam administrative experience and access to SharePoint.
- **Write** permissions to the **Documents** library using the SharePoint portal credentials.
- The Rsam instance must be configured with valid SSRS options.
- Application level network connectivity between Rsam application server and Microsoft SharePoint application.

Functions that EPM SharePoint Integration can Perform

This document will provide detailed steps for configuring EPM SharePoint integration to upload one published policy in PDF format to a SharePoint site. EPM SharePoint integration can be configured to perform the following functions using the basic components outlined here:

- Upload one policy to a SharePoint site
- Upload multiple policies to a SharePoint site
- Upload multiple policies to multiple libraries within the SharePoint site
- Create a folder with the policy group name within the SharePoint site and upload the policies within the folder

EPM SharePoint Integration Components



The following table lists the components of the EPM application that are used to construct the EPM SharePoint Integration feature.

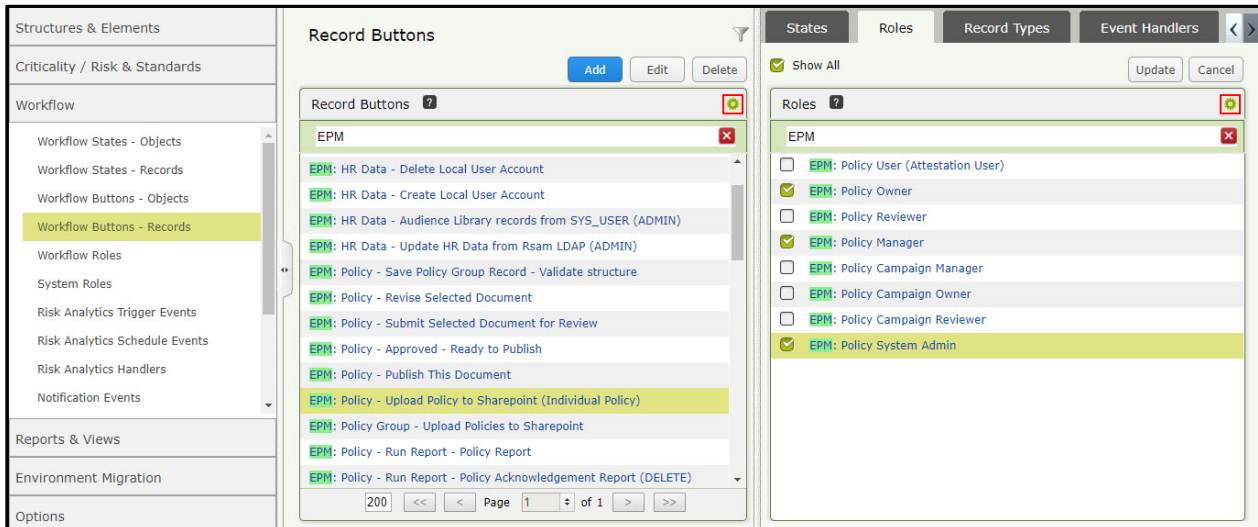
Component	Description	Details
Attribute Type: EPM: Policy Document - Attachment	This is a file attachment attribute type. It is optional and read only.	The attachment attribute type is located in the Policy tab of the EPM: Policy record type. When actions are performed that call the handler, EPM: Policy - Upload Published Policy to the attachment attribute , the attachment attribute is updated with the latest version of the policy in PDF format for the source record.
Workflow Button: EPM: Policy - Upload Policy to SharePoint (Individual Policy)	This is a workflow button to upload an individual policy to SharePoint.	<p>When active policies are in a Published workflow state, this button will appear in the Action menu for Policy Managers, Policy Owners, and Policy System Administrators.</p> <p>On clicking this button, the following actions are performed:</p> <ul style="list-style-type: none"> Updates the Policy Document attachment attribute with the latest version of the policy in PDF format by calling the report generator, EPM: Policy - Add Policy Document PDF as Attachment. Uploads the policy to the SharePoint site by executing the following API command: Web/GetFolderByServerRelativeUrl('/sites/dev/OrgPolicies/HR Policies')/Files/add;POST
Workflow Button: EPM: Policy Group - Upload Policies to SharePoint	This is a workflow button to upload multiple policies to SharePoint.	<p>When active policies are in a Published workflow state, this button will appear in the Action menu for Policy Managers, Policy Owners, and Policy System Administrators.</p> <p>The handler associated with this button is scoped to point to all the children records of the policy group, so that all the PDF documents can be uploaded to SharePoint for that policy group.</p> <p>On clicking this button, the following actions are performed:</p> <ul style="list-style-type: none"> Updates the Policy Document attachment attribute with the latest version of the policy in PDF format by calling the report generator, EPM: Policy - Add Policy Document PDF as Attachment. Uploads the policies to the SharePoint site by executing the following API command: Web/GetFolderByServerRelativeUrl('/sites/dev/OrgPolicies/HR Policies')/Files/add;POST

Component	Description	Details
Risk Analytics Handler: EPM: Policy - Upload Published Policy to the attachment attribute	This is the RA handler that calls the report generator to create the Policy Detail Report and attach it to the policy attachment attribute.	Performs the action of calling the report generator, EPM: Policy - Add Policy Document PDF as Attachment , to create the Policy Detail Report in PDF format and attach it to the EPM: Policy Document - Attachment attribute.
Risk Analytics Handler: EPM: Policy - Upload document to SharePoint	This is the RA handler that uploads the attached document to the SharePoint server.	Performs the action of executing the following API command and uploading the document to SharePoint server: Web/GetFolderByServerRelativeUrl('/sites/dev/OrgPolicies/HR Policies')/Files/add;POST
Report Generator: EPM: Policy - Add Policy Document PDF as Attachment	This is the report generator that creates the Policy Detail Report and attaches it to the Policy Document attachment attribute.	Creates a Policy Detail Report in PDF format by referencing the configuration record, EPM Policy Detail Report , and then writes it to the EPM: Policy Document - Attachment attribute in source policy record. The attached document is named using the following convention: [TI].[@@EPM: Policy ID] - [TI].[@@EPM: Policy Name] - [TI].[@@EPM: Version]
Manage Reports: EPM Policy Detail Report	This is the configuration record that provides the details of the SSRS report.	Provides details on the custom SSRS report (EPM_Policy_Detail.rdl) that will be executed.

Associating SharePoint Workflow Buttons to Workflow Roles

You can associate the SharePoint-related workflow buttons to the workflow roles by performing the following steps:

1. Go to **Manage > Administration**
2. In the left navigation panel, click **Workflow > Workflow Buttons - Records**
The Record Buttons page appears listing all the record buttons.
3. Click  and enter EPM in the search bar to list the EPM-related record buttons.
4. Search and select **EPM: Policy - Upload Policy to SharePoint (Individual Policy)** from the list.
5. Go to the **Roles** tab and click **Show All**.
6. Click  and enter EPM in the search bar to list the EPM-related workflow roles.
7. Select the following workflow roles:
 - a. EPM: Policy Owner
 - b. EPM: Policy Manager
 - c. EPM: Policy System Admin
8. Click **Update**.



The screenshot shows the R.sam administration interface. On the left is a navigation pane with categories like 'Structures & Elements', 'Criticality / Risk & Standards', 'Workflow', 'Reports & Views', and 'Environment Migration'. The 'Workflow' section is expanded to 'Workflow Buttons - Records'. The main area is split into two panes. The left pane, titled 'Record Buttons', shows a list of buttons with search filters and pagination. The right pane, titled 'Roles', shows a list of roles with checkboxes for selection. The 'EPM: Policy - Upload Policy to SharePoint (Individual Policy)' button is highlighted in the 'Record Buttons' list, and the 'EPM: Policy System Admin' role is checked in the 'Roles' list.

9. Repeat the same steps to associate the **EPM: Policy Group - Upload Policies to SharePoint** workflow button to the workflow roles (workflow roles are the same for both the buttons).

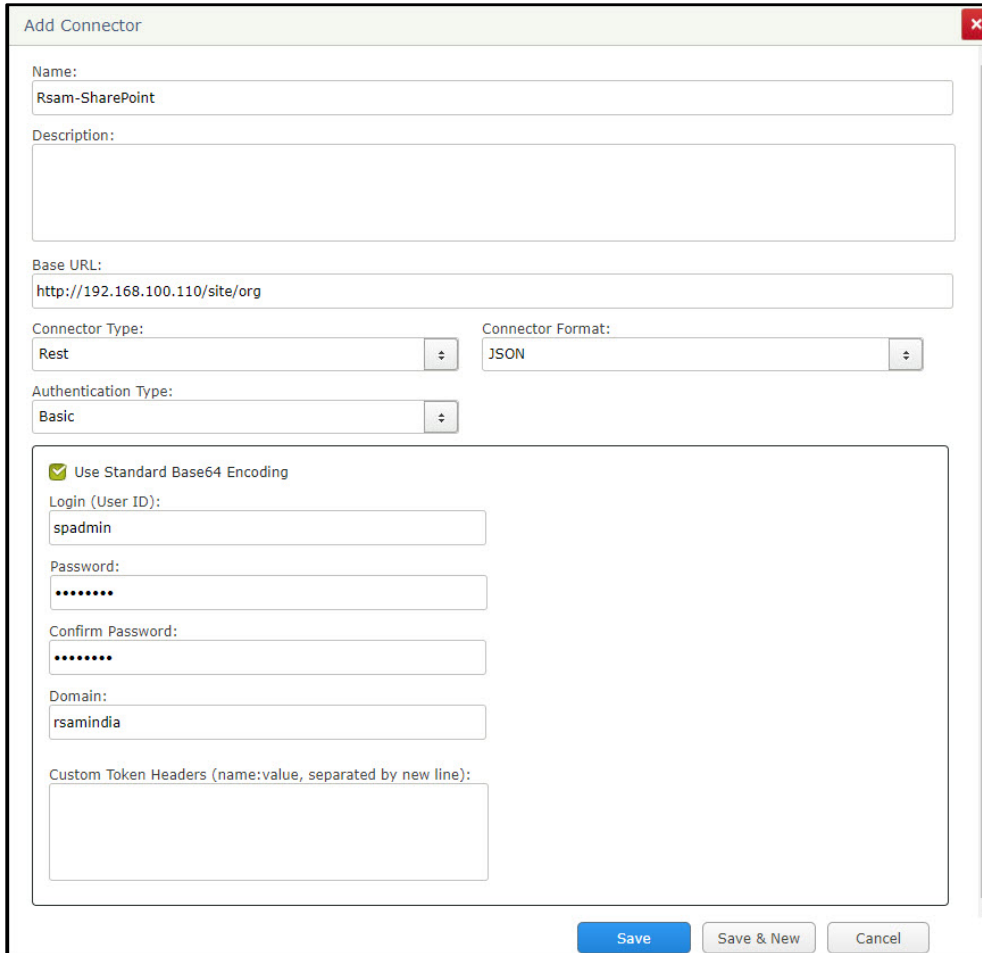
Adding/Updating the EPM SharePoint Connector

You can add/update the SharePoint connector to link to SharePoint using Basic authentication.

1. Go to **Manage > Administration**.
2. In the left navigation panel, go to **Options > Connectors**
The **Connectors** page appears listing all connectors.
3. In the Connectors page, either click **Add** or select an existing connector and click **Edit**.
The **Add Connector/Update Connector** dialog box appears.
4. Complete the attributes listed in the table below with the information that is specific to your Rsam and SharePoint configuration.

Attribute	Description	Example/Remarks
Name	Enter a connector name to integrate with SharePoint.	<i>Rsam-Policy Management</i>
Description	Enter the description about the connector.	Using this Connector, the Rsam system will upload the published policies to the SharePoint site.
Base URL	Enter the SharePoint URL.	<i>http://192.168.100.110/site/org</i> <i>https://192.168.100.110/site/org</i>
Connector Type	Select Rest from the drop-down list.	<i>Rest</i>
Connector Format	Select JSON from the drop-down list.	<i>Json</i>
Authentication Type	Select Basic from the drop-down list.	<i>Basic</i>
Use Standard Base64 Encoding	Make sure that this check box is not selected. SharePoint does not support Base64 encoding for user credentials.	<i>Not Checked</i>
Login (User ID)	Enter the username of the SharePoint user.	<i>User ID</i> Do not include the domain name, only the user name is sufficient.
Password	Enter the password of the user to authenticate the connection to the SharePoint site.	-

Attribute	Description	Example/Remarks
Confirm Password	Re-enter the password.	-
Change Password (Check Box)	Select the Change Password check box to change the password of an existing SharePoint configuration.	<i>This option appears only when updating an existing SharePoint connector.</i>
Domain	Optional. Enter in this field if you are connecting to a SharePoint domain.	<i>rsamindia</i> Do not include the extensions, the domain name is sufficient.
Custom Token Headers (name:value, separated by new line)	Optional. Passes additional request headers such as cookies and encryption standard for additional security. Specify each request header on a new line in the <i>name: value</i> format.	<i>Cookie: Skin=new</i> <i>Content-Length: 348</i>



Add Connector

Name:
Rsam-SharePoint

Description:

Base URL:
http://192.168.100.110/site/org

Connector Type: Rest Connector Format: JSON

Authentication Type: Basic

Use Standard Base64 Encoding

Login (User ID):
spadmin

Password:

Confirm Password:

Domain:
rsamindia

Custom Token Headers (name:value, separated by new line):

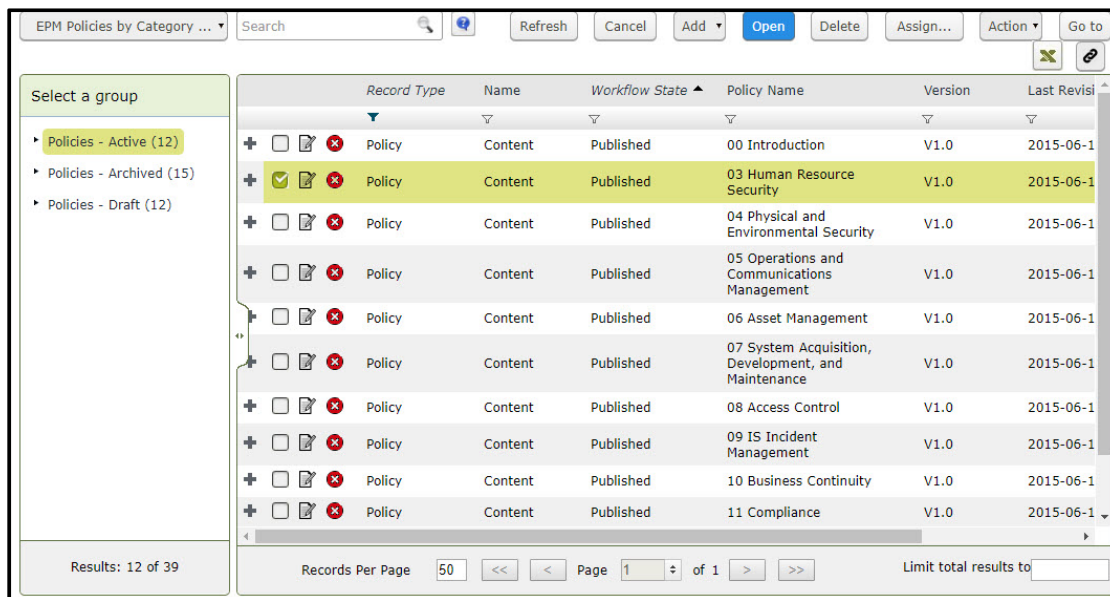
Save Save & New Cancel

5. Click **Save**.
The connector is saved.

Review and Test the Results

After the Rsam EPM to SharePoint configuration has been completed, test the process by clicking the **EPM: Policy - Upload Policy to SharePoint** button. Check if the document was created and attached to the policy record and then uploaded to SharePoint as expected. To review the results, perform the following steps:

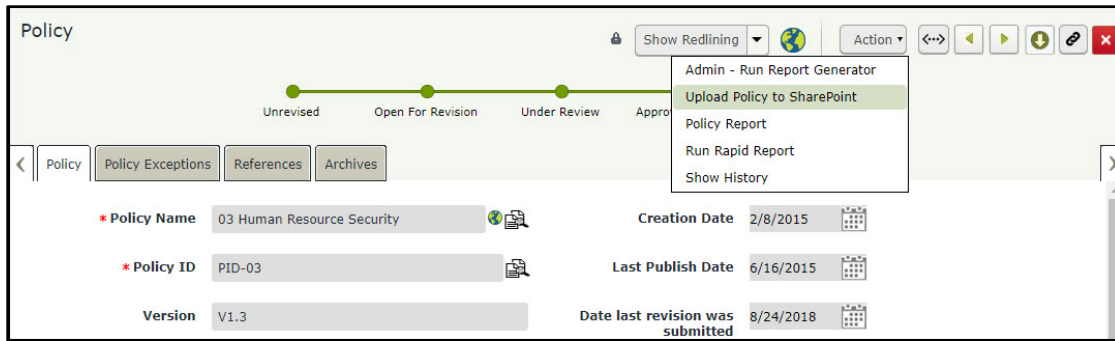
1. Go to Rsam Home Page.
2. In the left navigation panel, click **Policy Management > Policy Navigators**. The policy page appears.
3. Select **EPM policies by Category (nav)** from the filter.
4. In **Select a group**, click **Policies - Active**.
5. Select and open a policy record of your choice which has the **Policy Document** attachment attribute.



The screenshot shows the 'EPM Policies by Category' interface. On the left, there is a 'Select a group' panel with three options: 'Policies - Active (12)', 'Policies - Archived (15)', and 'Policies - Draft (12)'. The 'Policies - Active (12)' group is selected. The main area displays a table of policy records. The table has columns for 'Record Type', 'Name', 'Workflow State', 'Policy Name', 'Version', and 'Last Revisi'. The record '03 Human Resource Security' is highlighted in yellow. Below the table, there is a pagination control showing 'Records Per Page 50', 'Page 1 of 1', and a 'Limit total results to' field.

Record Type	Name	Workflow State	Policy Name	Version	Last Revisi
Policy	Content	Published	00 Introduction	V1.0	2015-06-1
Policy	Content	Published	03 Human Resource Security	V1.0	2015-06-1
Policy	Content	Published	04 Physical and Environmental Security	V1.0	2015-06-1
Policy	Content	Published	05 Operations and Communications Management	V1.0	2015-06-1
Policy	Content	Published	06 Asset Management	V1.0	2015-06-1
Policy	Content	Published	07 System Acquisition, Development, and Maintenance	V1.0	2015-06-1
Policy	Content	Published	08 Access Control	V1.0	2015-06-1
Policy	Content	Published	09 IS Incident Management	V1.0	2015-06-1
Policy	Content	Published	10 Business Continuity	V1.0	2015-06-1
Policy	Content	Published	11 Compliance	V1.0	2015-06-1

6. Click **Action > Upload Policy to SharePoint**.



7. After uploading the document to SharePoint, a success message appears.



8. Go to the SharePoint site and verify the document has been uploaded.

Appendix 1: Example Commands

This appendix provides example commands of document operations.

Upload File

```
Web/GetFolderByServerRelativeUrl('FolderPath')/Files/add;
```

For example, if your SharePoint site is "<http://SharePointSite/sites/myspace>" and the target folder where you want to upload the file is "publicpolicies", then the full command will be as follows:

```
Web/GetFolderByServerRelativeUrl('\sites/myspace/publicpolicies')/Files/add;
```

Create Folder

```
lists/getByTitle('BusinessandFinance')/rootfolder/folders/add(url='legal_policies')
```

Update Metadata File

Handler Action Command

```
Web/GetFileByServerRelativeUrl('/sites/LegalPolicies/UseofFacilities.txt')/ListItemAllFields
```

Handler Action Data

```
{" metadata":{"type":"SP.File"}, "Title": "Any title" }
```

Update Metadata Folder

Handler Action Command

```
Web/GetFolderByServerRelativeUrl('/sites/LegalPolicies')/ListItemAllFields
```

Handler Action Data

```
{" metadata":{"type":"SP.ListItem"}, "Title": "Any title" }
```

Appendix 2: Help and Support

To get familiar with specific Rsam features or to read in-depth information about any topic, access the following documentation:

- Rsam SharePoint Integration Guide
- End-User Help
- Administrator Help

If you still have any questions, contact **Rsam Technical Support**.