RSAM Version 9.0
Rapid Reports

Version 1.3

Prepared By:

Rsam

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Introduction

Rapid Reports allow customers to easily create your own “document-style reports” without having to directly utilize a report designer tool (like SSRS). Like most of Rsam functionality, the basic elements of Rapid Reports are simple to work with, but there are also many advanced features available which require more experience to work with.

In general, Rapid Reports are able to:

1. Run for Objects and Records
2. Show record / object properties and attribute values
3. Traverse from objects to related objects
4. Traverse from records to related records

At this point, Rapid Reports is not designed to:

1. Allow any detailed tailoring of the report styles
2. Integrate charts, summaries of data
3. Show controls, and other data outside of attributes

Pre-Requisites

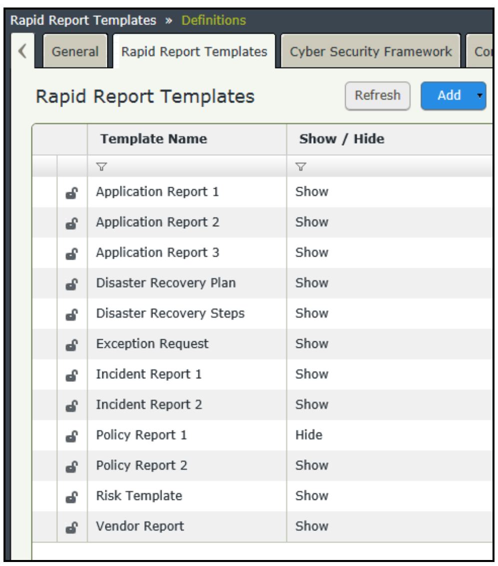
This guide assumes a basic understanding of Rsam objects, records, record categories, record types, workflow buttons, and handlers.

Overview of Rapid Report Elements

All layout and schema settings for Rapid Reports are controlled through a series of records in Rsam. While these record types are dynamic, it is expected that these record types will have at least the original attributes that they were distributed with.

Report Template Records

Templates are the root-level record type. Here you can specify general properties for the whole report, like report headers, footers, and default global style settings.

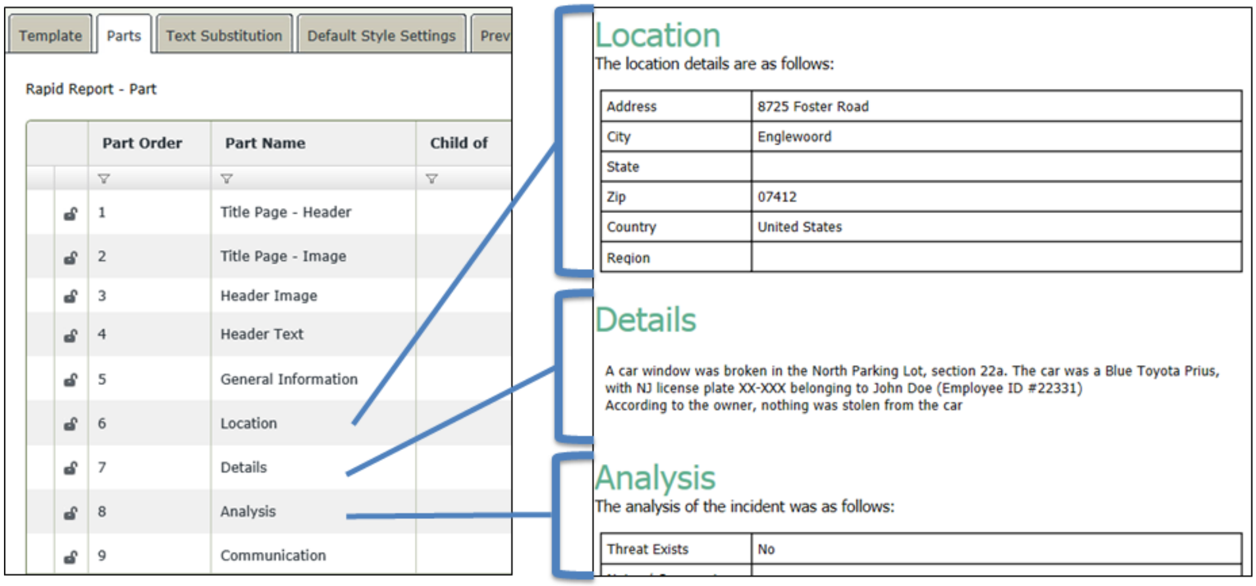


Report Part Records

Report part records are where you define the various “parts” of a report. Parts may represent an entire section of a report, or simply a series of attributes or image that you wish to display. Parts run sequentially from the top of the report to the bottom following the “part order”. Parts often run together contiguously (no breaks) to represent larger sections of the report.

Report parts can be singular (shown once), or can be repeated multiple times in the report (reviewed later)

- Report parts can also be children of other report parts, adopting the same targeted area of the parent report part (reviewed later)


Template
Parts
Text Substitution
Default Style Settings
Prev
Rapid Report - Part
Part Order
Part Name
Child of
1 Title Page - Header
2 Title Page - Image
3 Header Image
4 Header Text
5 General Information
6 Location
7 Details
8 Analysis
9 Communication
Location
The location details are as follows:
Address 8725 Foster Road
City Englewoord
State
Zip 07412
Country United States
Region
Details
A car window was broken in the North Parking Lot, section 22a. The car was a Blue Toyota Prius, with NJ license plate XX-XXX belonging to John Doe (Employee ID #22331)
According to the owner, nothing was stolen from the car
Analysis
The analysis of the incident was as follows:
Threat Exists No

Text Substitution Records

Text substitution records provide a method to define keywords that will be replaced inside of larger bodies of text. Adding a "text substitution records" tells Rsam to look for the keywords (or strings of text) and then substitute an alternative word (or string of text) for this. The alternative text could be static or dynamic (coming from an attribute or property of the object / record).

For example, if we defined the keyword [OBJECT_NAME] to be replaced with the actual Object Name of the current object…. We could write text like the following:

This report covers all issues for ***[OBJECT_NAME]….***

In the actual report for the object "Vendor X" this would appear as

This report covers all issues for ***Vendor X****….*

Text substitution affects the following areas of the report:

- Report Header & Footer
- Report Part Text (Top & Bottom)
- Report Table Header

Report Template Record

Create a template record for every report you wish to build. Simply open the Rapid Report Template category and click **Add** to create a new “template record”. Do this for each type of report you wish to be able to generate. You will then need to associate the template with the types of record / objects that can use that template. If a record or object has multiple templates, the user will be given an option to choose which template they wish to use after the report interface loads.

Attribute	Significance
Template Name	Name by which the template is referenced by administrators and users.
Show / Hide this item	Option to hide the template. This can be useful when creating new templates, or retiring old ones.
Report Header	Text to appear at the very top of each page of the report (except for the first page).
Report Header Image / Logo	Upload an image to appear in the upper left corner of each page (except for the first page). Images will be automatically shrunk to fit the header size.
Report Footer	Text to appear at the very bottom of each page of the report
Record types that can use this template	Specifies the types of records that will show this as a possible template.
Object types that can use this template	Specifies the types of object that will show this as a possible template.
Template Active	Select Yes to make this template appear for users. Otherwise the template is still in draft and will not be available to users.
Initiate Report from Parent Record	Selecting Yes to this will have Rsam pull the initial data / set the initial pointers to the parent record (as opposed to the targeted record). This is useful when you desire to target the parent record, and yet still keep the handler context on the targeted record.
Default Template Styles	Use these settings to specify the Default styles, specify colors and other visual properties for parts that have no style setting of their own. If a style is defined in the report part, that style will overwrite these default settings.

Report Part Record

Add report parts from within a template record under the “Parts” tab.

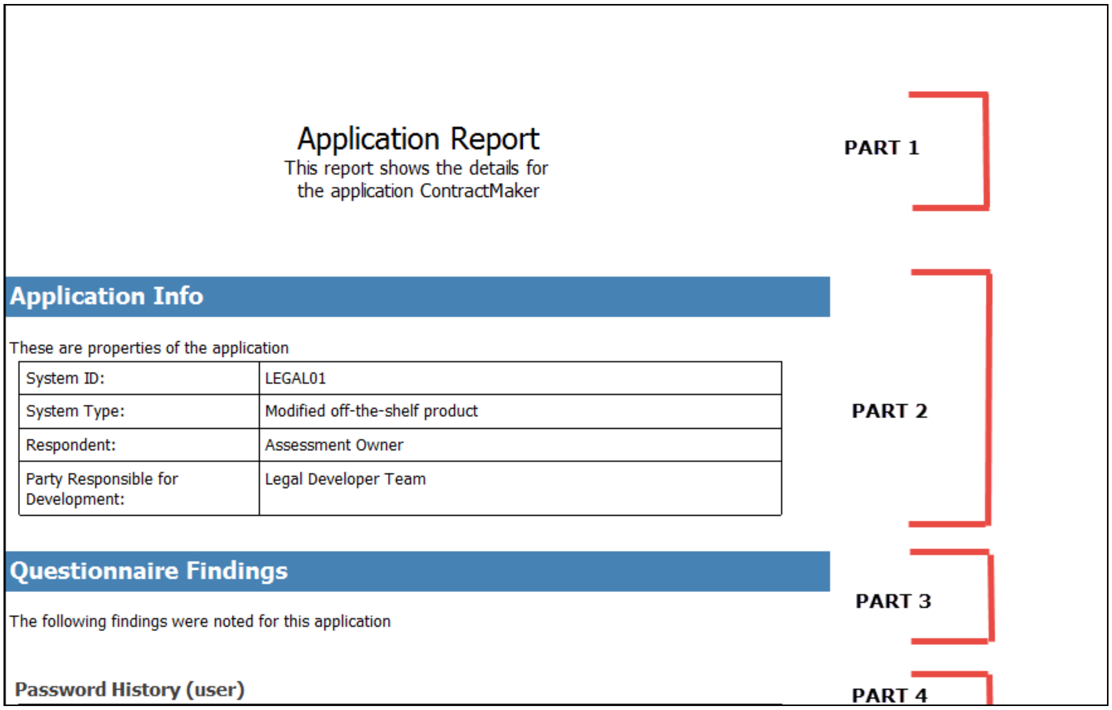
Attribute	Significance
Report Part Order	Order of the Part (from top to bottom in the report). You may type in your own number, or leave this blank. Leaving this blank will automatically populate the next order in line for this report. If you later desire to move the order of a part, simply open the part, change this value, and save the part. Rsam will automatically move the other parts as needed. 
Report Part Name	Name for administrators to reference this part
Report Part Indent	# of pixels to indent this part of the report. Use this to push some parts father to the right. Often useful for indenting child sections, or adjusting the position of an image.
Show / Hide this item	Option to hide the template. This can be useful when creating new templates, or retiring old ones.
Show this Report Part just once? or should this Report Part repeat?	Option to show this part just once, or to repeat it over and over based on a recurring element like a child record (see below) Section repeats for each record under this parent The settings in this part will be repeated over and over for each child record under the targeted item. The type of record to repeat on is also selected. *For example, all questionnaire findings under the selected object.* Section repeats for each related record (via attribute lookup) The settings in this part will be repeated over and over for each record related to the targeted record (following a saved search attribute). *For example, all risks related to the selected exception request* Section repeats for each related object (via attribute lookup) The settings in this part will be repeated over and over for each

	object related to the targeted object (following a saved search attribute). *For example, all related hosts for the selected application* <u>Section repeats for each object aspect</u> The settings in this part will be repeated over and over for each aspect under the targeted object. <u>Section repeats on a Saved Search (unfiltered)</u> The settings in this part will be repeated over and over for each row returned by a search. The search will be run in its entirety (not filtered to the current object / record). <u>Section repeats on a Saved Search (filtered to current object/record)</u> The settings in this part will be repeated over and over for each row returned by a search. The search will be filtered based on the targeted record / object. For example, records returned by the search will be limited to those belonging to the object that the report is targeting. <u>Display for Record's Parent Object</u> The part will run against the parent object of the targeted record.
Top / Bottom Text Parts	Large open text fields that appears near the top / bottom of the part. Customers can use their own formatting to determine the desired style / weighting. Note that this is OPTIONAL… sometimes it may be desirable to just show an image or grid as a part. In such cases, leave the text parts blank.
Image to Display	Option to display an uploaded image for this part. Images are NOT resized, so be sure to size the image accordingly. Acceptable images include: BMP, GIF, JPG, JPEG, PNG

Show attribute information in a table or grid?	This provides you with the option to show some attributes from the object / record. If nothing is selected here, then no attributes will be displayed. Plain (show attributes for selected items directly) Causes the text for the attribute to appear without any grid or table Table (show attributes for selected item in table) Displays the text of the attributes to appear in a table format Grid - Child This is a special feature where you would like to show a grid with each attribute in its own column, and each row representing a child record. Grid – Search (unfiltered) This is a special feature where you can show a grid based on the results of a search. Each row of the search results will be shown as a row in the grid. The attributes to show are based on the attributes selected in this part, not the attributes from the search itself. The search will be run in its entirety (not filtered to the current object / record). Grid – Search (filtered) This is a special feature where you can show a grid based on the results of a search. Each row of the search results will be shown as a row in the grid. The attributes to show are based on the attributes selected in this part, not the attributes from the search itself. The search will be filtered based on the targeted record / object. For example, records returned by the search will be limited to those belonging to the object that the report is targeting. Grid – Stored Procedure This is a special feature where you can show a grid based on the results of a SQL Stored Procedure. Special instructions on creating a SQL stored procedure are provided later in this guide.
Attributes to Display	Option to select a series of attributes to display in this part.

	Display All Attributes Causes all attributes associated with the selected item to be shown. Display All Attributes that are not set as hidden Causes all attributes (except those that have the Hidden property set) to be shown Select attributes to display individually Allows you to select the individual attributes to show.
Show attribute type name with each attribute	Causes the name of the attribute type to be shown with each attribute
Show attribute type question/description with each attribute	Causes the question / description (that appears in the form) to be shown with each attribute
Report Part is Child of Report Part	This is an advanced feature where a part can be made a child of another part, thus expanding on repeating parts of the report (reviewed below).
Custom Tag	Advanced feature to pass in an extra parameter to the SSRS report for custom SSRS coding by advanced customers.

Example of Report Parts



Application Report

This report shows the details for the application ContractMaker

PART 1

Application Info

These are properties of the application

System ID:	LEGAL01
System Type:	Modified off-the-shelf product
Respondent:	Assessment Owner
Party Responsible for Development:	Legal Developer Team

PART 2

Questionnaire Findings

The following findings were noted for this application

PART 3

Password History (user)

PART 4

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Example of Repeating Report Parts

In this example, we are repeating for each Questionnaire Findings under the object

Password History (user)

Control Name:	Password History (user)
Score:	3
Question Asked:	Are end-users restricted from using previous passwords (password history)?
Question Description:	
Supplied Comment:	

PART 4

Password Storage

Control Name:	Password Storage
Score:	5
Question Asked:	Are passwords stored in a secure manner?
Question Description:	
Supplied Comment:	

PART 4

Password Display

Control Name:	Password Display
Score:	5
Question Asked:	Are passwords hidden during authentication?
Question Description:	
Supplied Comment:	

PART 4

Example Showing Child Records as a Grid

Communication Type	Communicated With	Notes / Comments	Communication with Individual	Communication File Attachments
Phone	John Doe	Received a call from Mr Doe requesting an updated on the case. Informed him that there were no important updates at this point		
Email	John Smith	Example		

Child Records as a Grid

Using the Repeat Feature

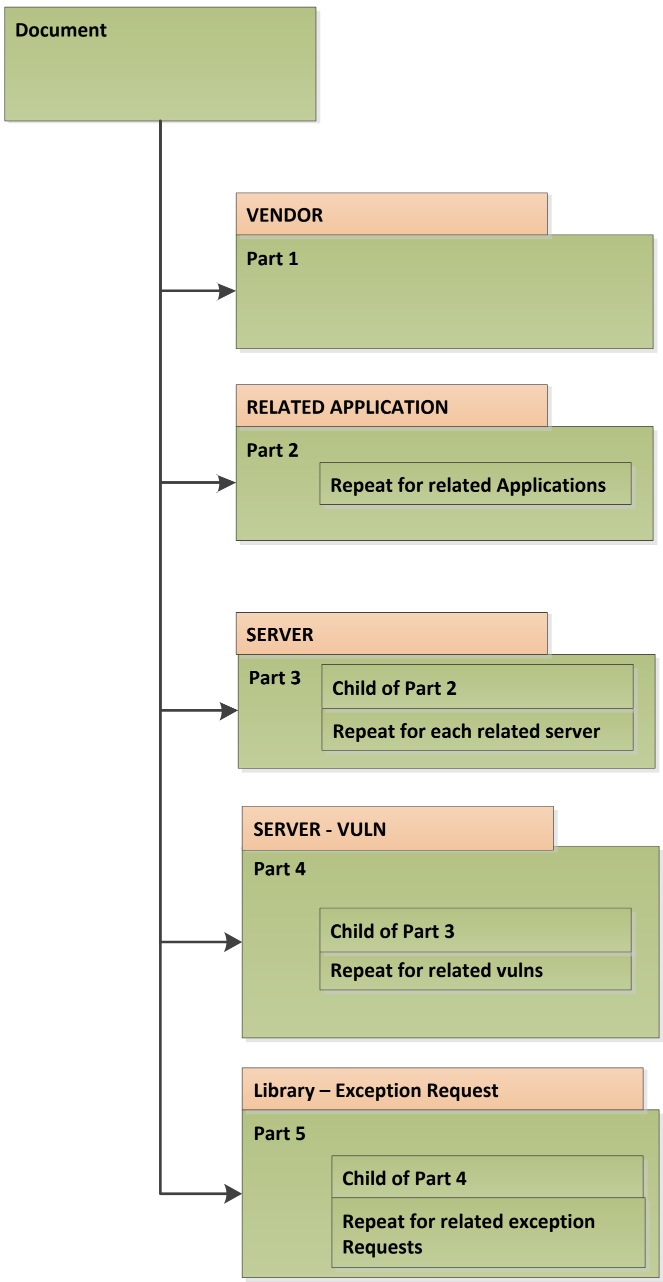
The "Repeat" feature allows you to repeat an entire part over and over again for children and related objects & records. Everything defined in the part (title, body text, attributes, etc) will be repeated over and over for each related item. This is extremely useful to present Attributes for child or related records / objects

Using the "Child Of" Feature

The child feature is used in combination with the repeat feature. Making a part a "child" of a repeated part resets that new part's target as the item being repeated. This allows you to easily transition the focus of the report to the related items. This also allows you to follow a cascading series of relationships in the report.

For example:

1. PART: Report is generated for a Vendor Object
    a. REPEATED PART: In the Vendor Object, we chose to repeat a report part for each Application object related to the vendor and show the details of the application
        i. CHILD PART: For each Application, we choose to show the applications Server
            1. CHILD PART: For each server we choose to show all vulnerabilities within the Server


Document
VENDOR
Part 1
RELATED APPLICATION
Part 2
Repeat for related Applications
SERVER
Part 3
Child of Part 2
Repeat for each related server
SERVER - VULN
Part 4
Child of Part 3
Repeat for related vulns
Library – Exception Request
Part 5
Child of Part 4
Repeat for related exception Requests

Using the Report Templates

The Rapid Reports is designed to be used as part of a workflow button click or a scheduled report generator (NOT directly from the reports interface). This provides the most control of when / how the templates will be leveraged. To use the Rapid Reports follow these basic steps:

1. Use Rsam's default Rapid Reports handler, or create a new handler with the Action set to "Run SSRS Report"
    a. Choose the Rapid Reports template report
2. Use Rsam's default Rapid Reports workflow button or create a workflow button for an object or record that executes the handler
3. Apply the workflow button to the desired objects types / record types, workflow states, and roles/

Now users with the designated role(s) will be able to click on the button to execute this template.

You may also follow the same process above, but execute the template through a "Report generator" to have Rsam automatically generate the report and store it / email it.

Setting a Default Template

If a record type / object type is associated with multiple templates the user must select a template before the report is displayed. A default attribute is included, however, to allow you to set the default template to be used for each individual object / record. This can be useful when scheduling report generation for items with multiple report templates, or to auto-select a specific template in specific scenarios.

To set a default template for an object or record, follow these simple steps:

1. Associate the “RRPT: Default Rapid Reports Template” attribute type with the desired object type / record type
2. In the object or record, select the desired template or have Rsam automatically select this using a handler.

Notes on Permissions

Administrators control access to the Rapid Reports functionality by controlling which roles can click on the reports button. In addition to this, you may control which templates a user can select from by choosing roles within the template records themselves. Selecting no roles tells Rsam to open the template to all users with access to the workflow button.

Note that, with the exception of the above controls, Rsam does not place any restrictions a user's access to the report data. Customers must control which buttons they wish to allow the user to execute and on which objects/records. Once the template is generated it will look the same for any user with the ability to leverage that template.

Populating a Grid with a Stored Procedure

Report parts contain an option under "Show attribute information in a table or grid?" to use a "Stored Procedure". When selected, this tells Rsam to execute a stored procedure and display those results in a grid. This allows customers to show types of information in the report that are not part of the Rapid Reports feature sets.

Important information on using this feature:

1. Custom SQL procedures are not covered by Rsam technical support. Customers executing custom procedures muse test their procedure with new version of Rsam.

2. Custom SQL procedures require SQL DBA or developer skills.

3. The SQL procedure require the following parameters. If needed, these parameters can be used to filter the results of the query based on the targeted record / object.
    - `@A_FINDING_ID INT = NULL`
    - `@A_OBJ_ID INT = NULL`

4. The RSAM_CLIENT role must have access to execute the SQL Procedure

5. The SQL procedure must return the following columns. This information will be pivoted in a grid in the report.

Field	Type	Description
ID	INT	Unique ID for each Row
HEADER_VALUE	VARCHAR(500)	Column Header Name
HEADER_SORT	INT	Column Header Order
DATA_VALUE	VARCHAR(5000)	Value to show in that Row / Column

Example Raw Data Returned in SQL

ID	HEADER_VALUE	HEADER_SORT	DATA_VALUE
1	Incident Name	1	Car vandalized in the parking lot
1	Severity	2	Medium
1	Date of Entry	3	9/1/2015
2	Incident Name	1	Virus outbreak on Windows servers
2	Severity	2	High
2	Date of Entry	3	9/15/2015
3	Incident Name	1	Unexpected network outage
3	Severity	2	Low
3	Date of Entry	3	9/18/2015

How this data would appear on the report:

Incident Name	Severity	Date of Entry
Car vandalized in the parking lot	Medium	9/1/2015
Virus outbreak on Windows servers	High	9/15/2015
Unexpected network outage	Low	9/18/2015

Installing Rapid Reports

Take the following steps to install Rapid Reports in your Rsam instance. It is recommended that you install Rapid Reports in a non-production environment first to learn and test the features, and then in production later.

Requirements

The following requirements must be met to implement Rapid Reports

- Rsam Version 9.01419157 or higher
- SSRS for Rsam Generated SSRS reports is installed / configured

*Note that you must be licensed for Rsam Generated SSRS reports to leverage Rapid Reports

Installation Steps

If the environment is ready to go, installation of Rapid Reports should take 20 minutes or less.

Step 1: Download the Rapid Reports package from the Rsam community portal

Step 2: Perform a backup of your SQL database

Step 3: Execute the SQL script provided to create/update the required procedures.

- Your DBA will use SQL Management Studio to run the script
- The script will create the necessary SQL procedures used for Rapid Reports

Step 4: Deploy the SSRS RDL files to your SQL SSRS server. If you have used a custom data source, you may need to change this before deploying

- Your Server Administrator will be able to upload these reports using Visual Studio, or the integrated SSRS Web front-end.

Step 5: Use the Rsam Migration Interface to Import the Rapid Reports Migration (.xml) file.

- Login as an Rsam Administrator
- Click on Manage -> Administration

- Click on Environment Migration -> Import
- Select the migration (.xml) file provided from Rsam
- Click Import

Step 6: Enable the Report Generation buttons

- You may use Rsam's default handlers and workflow buttons for executing Rapid Reports, or you may create your own
- Be sure to associate the workflow buttons with the desired object / record types, roles, and workflow states