Rsam Upgrade Guide

Updating to the new 9.016+ Assessment Questionnaire Feature

Contents

About This Guide

This Getting Started Guide provides information on upgrading an existing pre-9.016 Rsam instance to take advantage of the newer **Assessment Questionnaire** feature, available in Rsam from version **9.016**. The guide aims to provide a walk-through of the technical steps to be followed by Rsam Administrators and SQL administrator.

Intended Audience

This document is intended for the Rsam Administrators and SQL administrator to walk through the necessary steps

Upgrade to Assessment Questionnaire

Performing following steps will upgrade your existing Rsam instance to take advantage of the new Assessment Questionnaire feature.

Pre-Upgrade Steps

1. Take a backup of your SQL database to restore, in case of any issues.

2. Upgrade your current Rsam instance to 9.016+. This can be completed by following the *Rsam 9.016 Installation / Upgrade Guide*.

Administrative Tasks to Upgrade

1. Login to your Rsam instance using an account with administrator access.

2. Import the Rsam Environment migration file **01. AQ_ENV_MIGRATION_PACKAGE.xml** provided by Rsam Support:

   a. Click **Manage** > **Administration** > **Environment Migration** > **Import**.

   b. Click **Browse** and select the **01. AQ_ENV_MIGRATION_PACKAGE.xml** file.

   c. Click **Import**.

   d. Check for unanticipated skips in the import process:

      i. The following screens highlight the rows to review. These rows should not include any number in the SKIPPED column.

      ii. If any skips exist in these rows, save your Migration Summary report and send to Rsam support for review.

      iii. Skips in other (non-highlighted) rows are acceptable

Summary Log: View Import Summary Log Details

Table Name ▲	Total Records	ADDED	UPDATED	DELETED	SKIPPED
ATTRIBUTE	10	10	-	-	-
ATTRIBUTE_LANGUAGE	-	-	-	-	-
ATTRIBUTETYPE	56	56	-	-	-
ATTRIBUTETYPE_LANGUAGE	-	-	-	-	-

ATTRIBUTETYPE_WF_ROLE	-	-	-	-	-
DISPLAY_TAB	3	3	-	-	-
DISPLAY_TAB_FI_FINDINGTYPE_...	-	-	-	-	-
DISPLAY_TAB_FILTER_PARAMETER	-	-	-	-	-
DISPLAY_TAB_GROUPING	2	2	-	-	-
DISPLAY_TAB_LANGUAGE	-	-	-	-	-
DISPLAY_TAB_WIDGET_PARAM_L...	-	-	-	-	-
FI_CATEGORYTYPE	8	8	-	-	-
FI_CATEGORYTYPE_LANGUAGE	-	-	-	-	-
FI_FINDINGTYPE	7	7	-	-	-
FI_FINDINGTYPE_CATEGORYTYPE...	-	-	-	-	-
FI_FINDINGTYPE_FINDINGTYPE	3	3	-	-	-
FI_FINDINGTYPE_LANGUAGE	-	-	-	-	-
FI_FINDINGTYPE_TAB	17	17	-	-	-
FI_FINDINGTYPE_TAB_LANGUAGE	-	-	-	-	-
FI_FINDINGTYPE_WF_BUTTON	42	37	-	-	5
FI_OBJECTTYPE_ASSESSMENT_Q...	-	-	-	-	-
OBJECTTYPE	1	1	-	-	-
OBJECTTYPE_ASPECTTYPE	-	-	-	-	-
RA_EVENT_EVENTHANDLER_ATTT...	3	3	-	-	-
RA_EVENTHANDLER	20	20	-	-	-
RA_EVENTHANDLER_ACTION	36	36	-	-	-
RA_EVENTHANDLER_ACTION_LA...	-	-	-	-	-
RA_EVENTHANDLER_CRITERIA	10	10	-	-	-
RA_EVENTHANDLER_CRITERIA_L...	-	-	-	-	-
SEARCH	15	15	-	-	-
SEARCH_LANGUAGE	-	-	-	-	-

SYS_USER_AGRP_GROUP	-	-	-	-	-
SYS_WF_BUTTON	22	22	-	-	-
SYS_WF_BUTTON_LANGUAGE	-	-	-	-	-
SYS_WF_BUTTON_NOTIFICATION...	-	-	-	-	-
SYS_WF_BUTTON_ROLE	296	296	-	-	-
SYS_WF_ROLE	3	3	-	-	-
SYS_WF_ROLE_ASSIGN_ROLE	-	-	-	-	-

SYS_WF_ROLE_SEARCH	9	9	-	-	-
SYS_WF_STATE	10	10	-	-	-
SYS_WF_STATE_BUTTON	142	142	-	-	-

3. Execute the one-time SQL conversion script to convert your questions and objects into the new questionnaire format:

   a. Log in as the SQL Administrator.

   b. Execute the **02. AQ_ENABLE_NEW_QUESTIONNAIRE.sql** file, provided by Rsam support, against the Rsam database.

   Note: This script will likely take multiple hours to complete. During this process, it is recommended that users do not answer any existing questions in the questionnaire.

4. Assign the desired user accounts.
   The Assessment questionnaire script builds a library object, and the appropriate roles and user groups to access the new AQ libraries. Customers must provide their users with the proper access to manage the assessment question libraries by assigning the desired **AQ: roles** to the proper users / groups on the library object:

   a. Rsam includes user groups for Editors, Reviewers, and Managers. Customers can assign the groups to the library object with the roles - **AQ: Editor**, **AQ: Reviewer**, and **AQ: Manager**, and then assign targeted users to these groups, as desired.

Following image shows an example mapping of user group to object and providing required permission.

Post Upgrade

After successfully completing the upgrade to the new Assessment Questionnaire, all existing questions and object responses should be converted to the new format. You may refer the *Rsam Getting Started Guide for Assessment Questionnaire* to explore the new questionnaire interface and features.