



Basic Administrator Training

Exercise: 1
Record Configuration – Part 1

Version Information

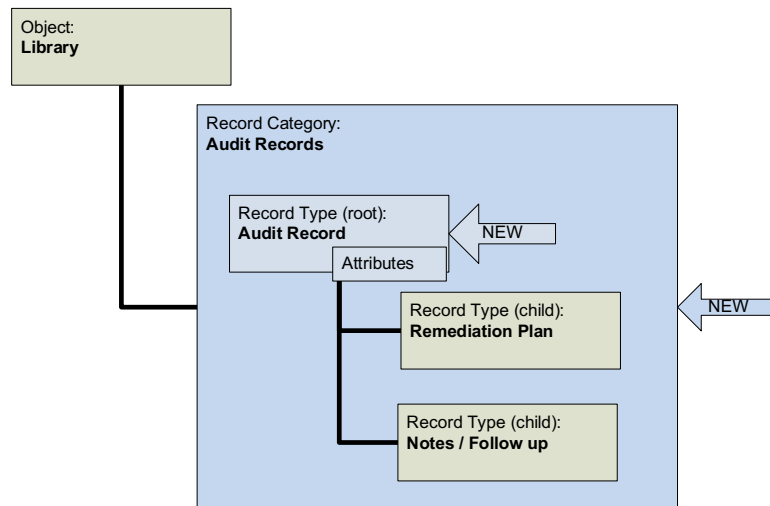
Version	Date Released	Notes
2019-1	Jan 8 th 2019	Updated Format
2019-2	May 16 th 2019	Re-Branded to meet Galvanize design guidelines
2020-1	Jan 6 th 2020	Updated Screenshots after Version 10 Update

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Scenario Description

In this exercise, you will configure Rsam to record audit records that will be managed and reported in Rsam. Records will be logged under a general library object, and will have attributes and child records. Review the diagram below. The items marked **New** are what you will add.



Prerequisites

This tutorial assumes the following elements exist in the default Rsam Database.

- **Object Type** – a Library for Global Records
- **Object** - At least one object instance of the type “Library for Global Records” object type (i.e., Global Records)
- **Record Types** - Remediation Plan (POAM); Risk Acceptance Request

Session 1: Creating Record Categories and Types

Record Categories represent a collection of records containing information you record in the Records module. In general, you will create a Record Category for each use-case you wish to implement in Rsam. Categories can hold one or more types of records.

Create The Record Category

IMPORTANT INFORMATION:

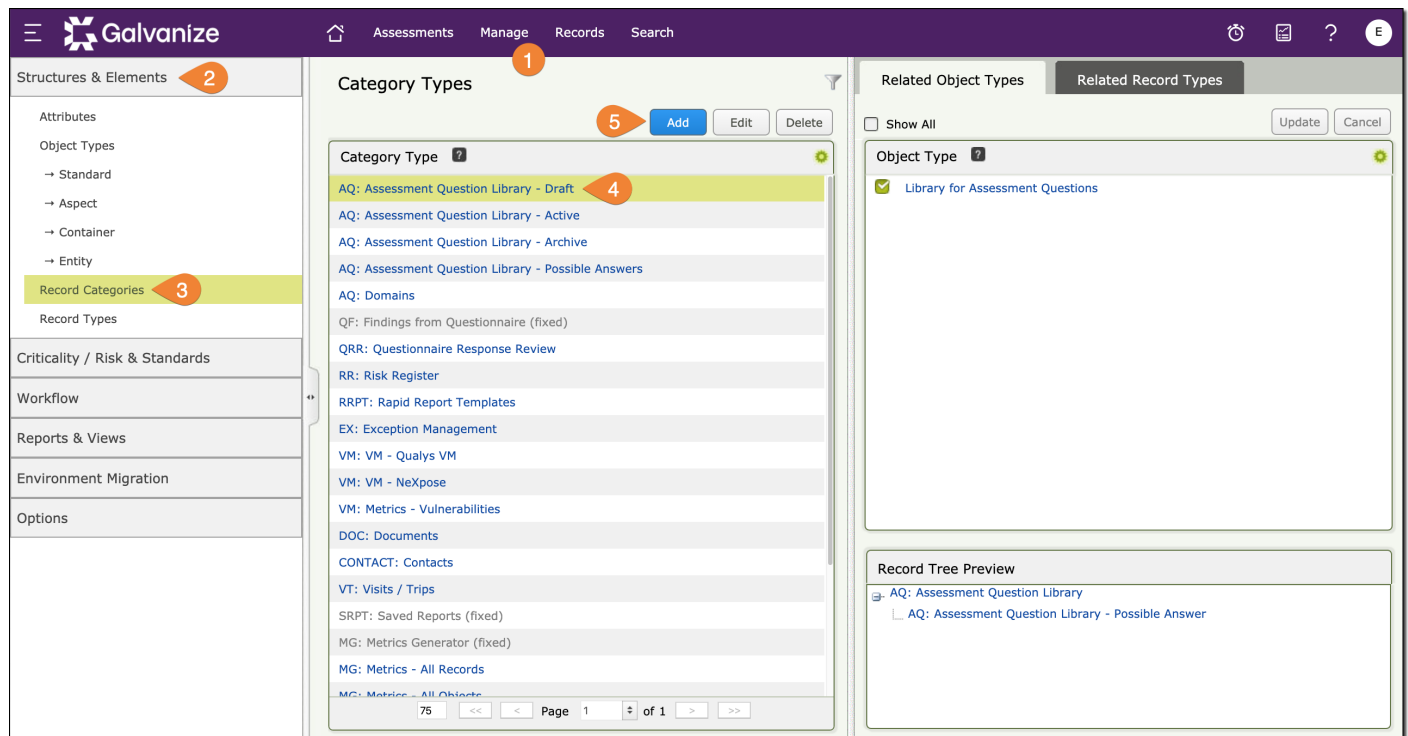
Throughout the scenarios, Use **“TRN”** as a Rsam Admin Name prefix for your instance of Rsam. E.g., Instead of the Category Name **“Audit Records”** enter **“TRN: Audit Records”**.

Steps to Follow:

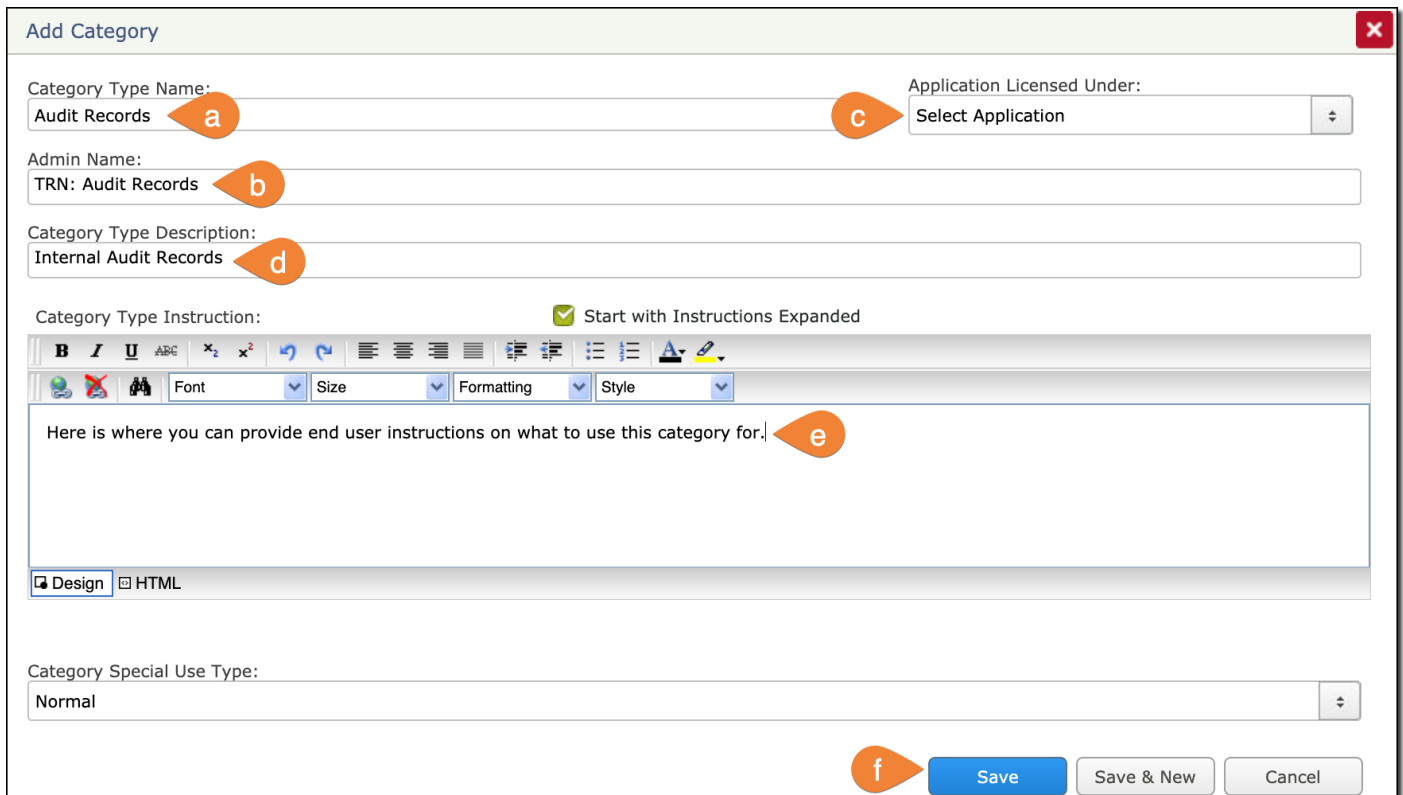
1. Select **Manage -> Administration**
2. Using the Left Menu, expand **Structures & Elements** (if not already expanded)
3. Select **Record Categories**
4. In the **Category Types Pane**, select any existing category type.

Note: The new category type will be created below this one. If you don't select an existing category type then your new one will be placed at the bottom of the list.

5. Click **Add**



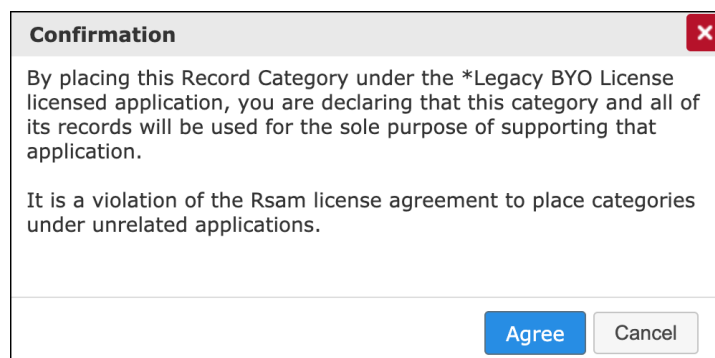
6. In the Add Category screen (See figure below), enter the following values
 - a) Category Type Name: **Audit Records**
 - b) Admin Name: **TRN: Audit Records**
 - c) Application Licensed Under: ***Legacy BYO License**
 - d) Category Type Description: **Internal Audit Records**
 - e) Category Type Instruction: **Here is where you can provide end user instructions on what to use this category for.**
 - f) Click **Save**



The screenshot shows the 'Add Category' dialog box with the following fields and annotations:

- Category Type Name:** (Annotation a)
- Admin Name:** (Annotation b)
- Category Type Description:** (Annotation d)
- Application Licensed Under:** (Annotation c)
- Category Type Instruction:** (Annotation e). Above this field is a checkbox labeled 'Start with Instructions Expanded' which is checked.
- Category Special Use Type:**
- Buttons:** **Save** (Annotation f), **Save & New**, and **Cancel**.

7. At the Confirmation Dialogue Box, click **Agree**



The screenshot shows the 'Confirmation' dialog box with the following text:

By placing this Record Category under the *Legacy BYO License licensed application, you are declaring that this category and all of its records will be used for the sole purpose of supporting that application.

It is a violation of the Rsam license agreement to place categories under unrelated applications.

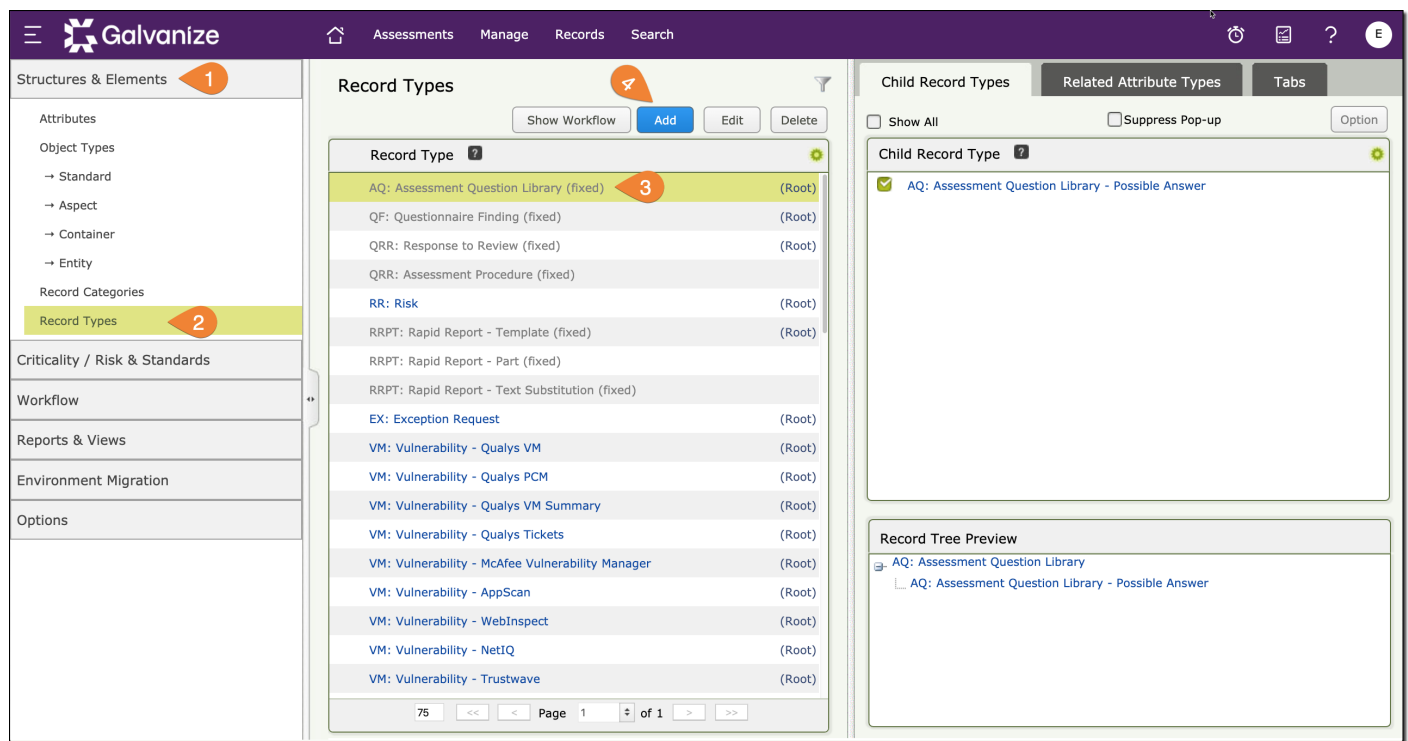
Buttons: **Agree** and **Cancel**.

Create the Record Type

Record Types are the different groups of information types recorded in the Records module. Within a single record category, you will have one or more record types.

Steps to Follow:

1. Expand **Structures & Elements**
2. Select **Record Types**
3. In the **Record Types** Tab, select an existing record type. The new record type will be created below this one.
4. Click **Add**



The screenshot displays the Galvanize application interface for configuring Record Types. On the left, the 'Structures & Elements' sidebar is expanded, and 'Record Types' is selected. The main content area shows a list of existing Record Types, including 'AQ: Assessment Question Library (fixed)', 'QF: Questionnaire Finding (fixed)', 'QRR: Response to Review (fixed)', 'QRR: Assessment Procedure (fixed)', 'RR: Risk', 'RRPT: Rapid Report - Template (fixed)', 'RRPT: Rapid Report - Part (fixed)', 'RRPT: Rapid Report - Text Substitution (fixed)', 'EX: Exception Request', 'VM: Vulnerability - Qualys VM', 'VM: Vulnerability - Qualys PCM', 'VM: Vulnerability - Qualys VM Summary', 'VM: Vulnerability - Qualys Tickets', 'VM: Vulnerability - McAfee Vulnerability Manager', 'VM: Vulnerability - AppScan', 'VM: Vulnerability - WebInspect', 'VM: Vulnerability - NetIQ', and 'VM: Vulnerability - Trustwave'. The 'Add' button is highlighted. On the right, the 'Child Record Types' panel shows a list of child types, with 'AQ: Assessment Question Library - Possible Answer' selected. The 'Record Tree Preview' panel shows the hierarchy of the selected child type.

Use the following to add a new Record Type (see figure next page).

- a. Record Type Name: **Audit Records**
- b. Admin Name: **TRN: Audit Records**
- c. Record Type Description: **Record Type for Internal and External Audit Findings and Resolutions**
- d. Workflow State: **GEN: Finding Open**
- e. Click **Save**

Do not change any other settings

Add Record Type

Record Type Name:
Audit Records

Admin Name:
TRN: Audit Records

Record Type Description:
Record Type for Internal and External Audit Findings and Resolutions

Record Type Instruction:
☐ Start with Instructions Expanded

Workflow State that the new record will start in:
GEN: Finding Open

Workflow button to simulate when creating a new Record:

Workflow button to simulate after inline edit:

Workflow button to simulate when saving a Record:

☐ Enable Visual Workflow
☒ Show Column Headers
☒ Root Level Record Type (no parents)
☐ Show Parent Identifier Attributes in Header
☐ Auto-Save new records when adding child records

☒ Show Workflow State Column
☒ Show Record Type Column
☐ Use "Move Record"
☐ Restrict adding new records based on the Object's Workflow State

When a record of this type is created, execute the following stored procedure:
☐ Execute SP Before Display

Records's Use Type:
Normal

Save Save & New Cancel

Relate TRN: Audit Record to Existing Child Record Types

You will select child level record types to be placed under this root level record type.



We did not create the child record types, these already existed in the system and come standard with various modules

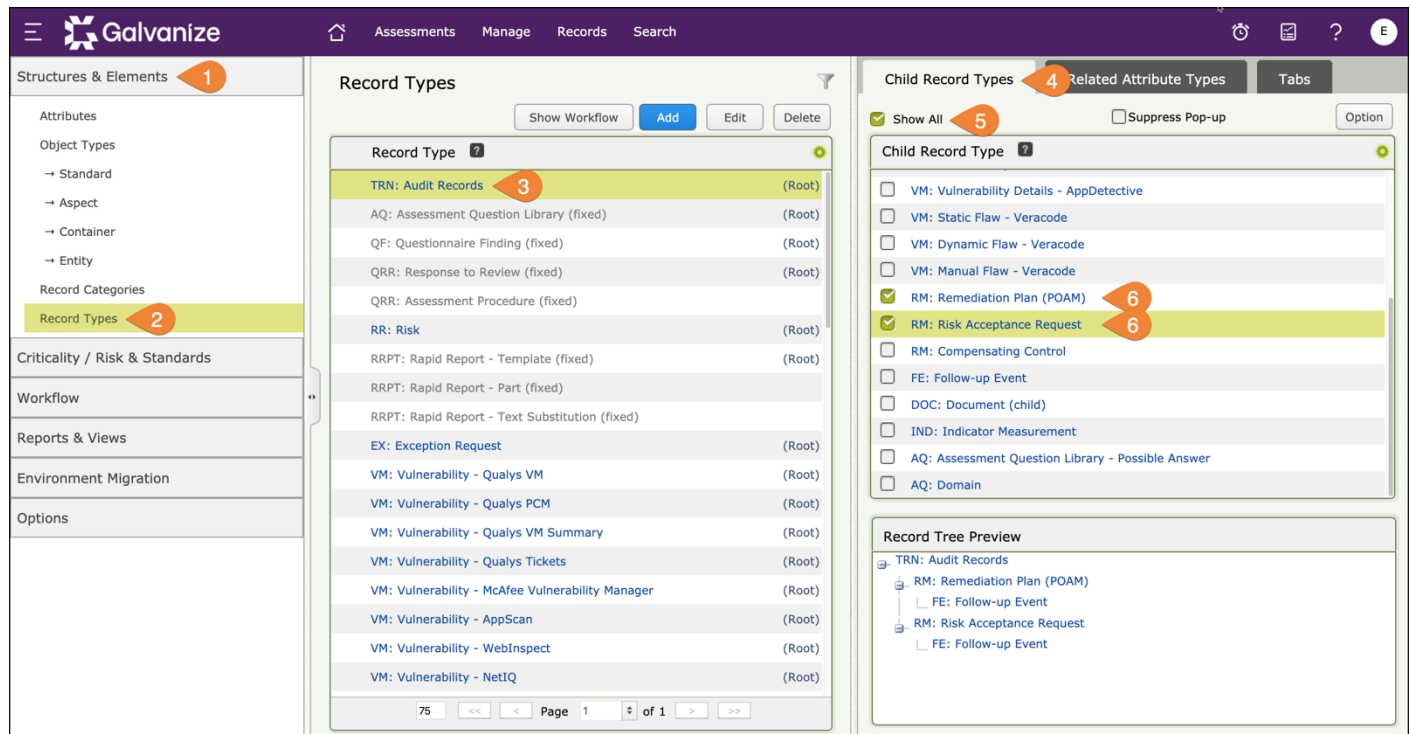
Steps to Follow:

1. Select **Structures & Elements** Menu
2. Select **Record Types** from the **Structures & Elements** Menu
3. Select **TRN: Audit Record** in the Record Types area
4. Select the **Child Record Types** tab
5. Check **Show All**
6. Check the **RM: Remediation Plan (POAM)** and **RM: Risk Acceptance Request** Child Record Types.

When the **Record Type -> Child Options** dialog box appears, leave everything as default and then click **Save**



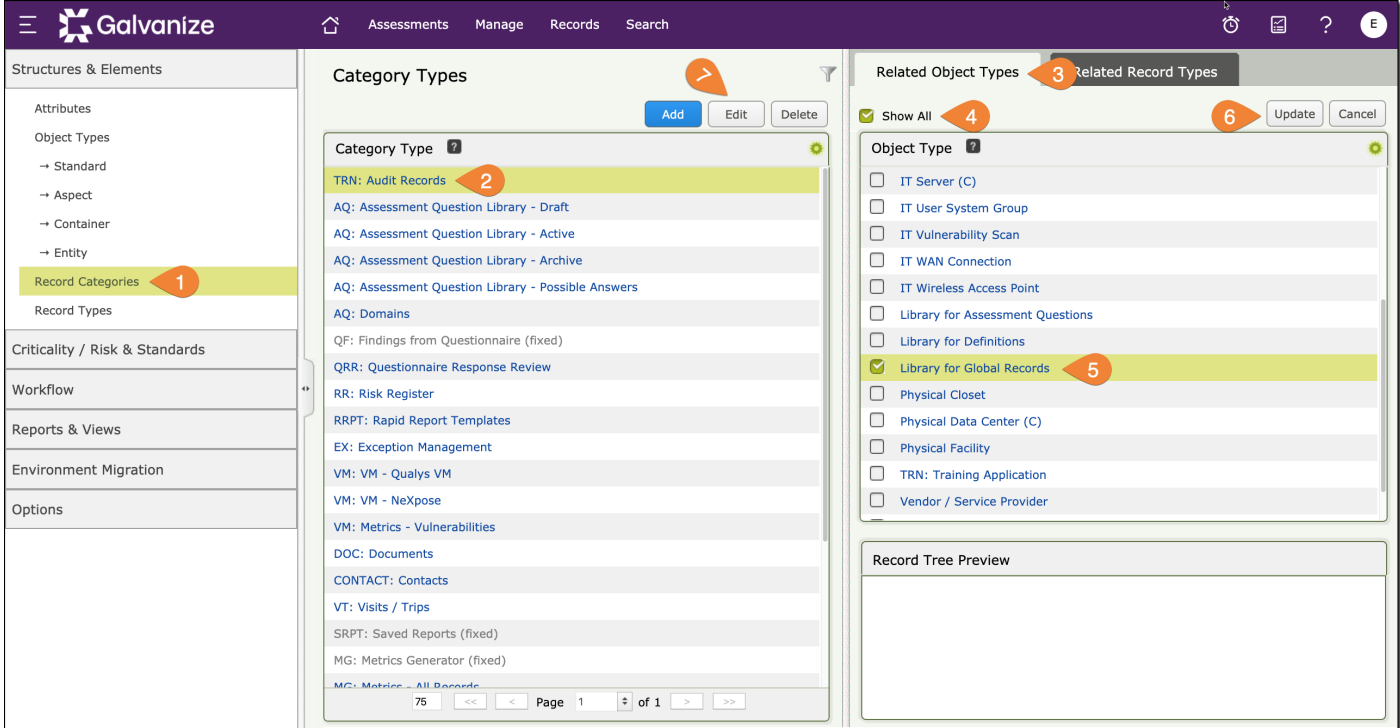
Clicking the “Suppress Pop-Up” option would stop that pop up appearing. Useful if you are making no changes to the default settings and linking a large number of child records..



Relate the 'Record Category Type' with the Object Types and Record Types

Steps to Follow:

1. Select **Record Categories** from the **Structures & Elements** area.
2. Select the **TRN: Audit Records** category type
3. Select the **Related Object Types** tab
4. Check **Show All** if nothing is displayed
5. Check the Object Type: **Library for Global Records**
6. Click Update
7. With the **TRN: Audit Records** record category still highlighted in the **Category Types** middle window pane, click **Edit**.



The screenshot displays the Galvanize application interface with the following components and annotations:

- Left Sidebar (Structures & Elements):**
 - Record Categories** is highlighted with an orange circle labeled **1**.
- Category Types (Middle Pane):**
 - The **TRN: Audit Records** category type is highlighted with an orange circle labeled **2**.
 - Buttons **Add**, **Edit**, and **Delete** are visible at the top right of the pane.
- Related Object Types (Right Pane):**
 - The **Related Object Types** tab is selected, indicated by an orange circle labeled **3**.
 - The **Show All** checkbox is checked, indicated by an orange circle labeled **4**.
 - The **Library for Global Records** object type is checked, indicated by an orange circle labeled **5**.
 - The **Update** button is highlighted with an orange circle labeled **6**.
- Record Tree Preview:** A section at the bottom right of the interface.

8. Click the magnifying glass next to the **Default to placing all records of this category under the following object:**

Update Category

Category Type Name:

Audit Records

Application Licensed Under:

*Legacy BYO License

Admin Name:

TRN: Audit Records

Category Type Description:

Internal Audit Records

Category Type Instruction:

☒ Start with Instructions Expanded

Here is where you can provide end user instructions on what to use this category for.

Default to placing all records of this category under the following object:

8

Category Special Use Type:

Normal

Save

Close

9. Select **Global Records -> Library for Global Records**
10. Click **Update**
11. Click **Save**

Default to placing all records of this category under the following object:

Select column for quick lookup:

Object Name

Type text to search:

Start typing here

Object Name	Object Type
Global Records	Library for Global Records

Records per page

75

<<

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Page

1

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of 1

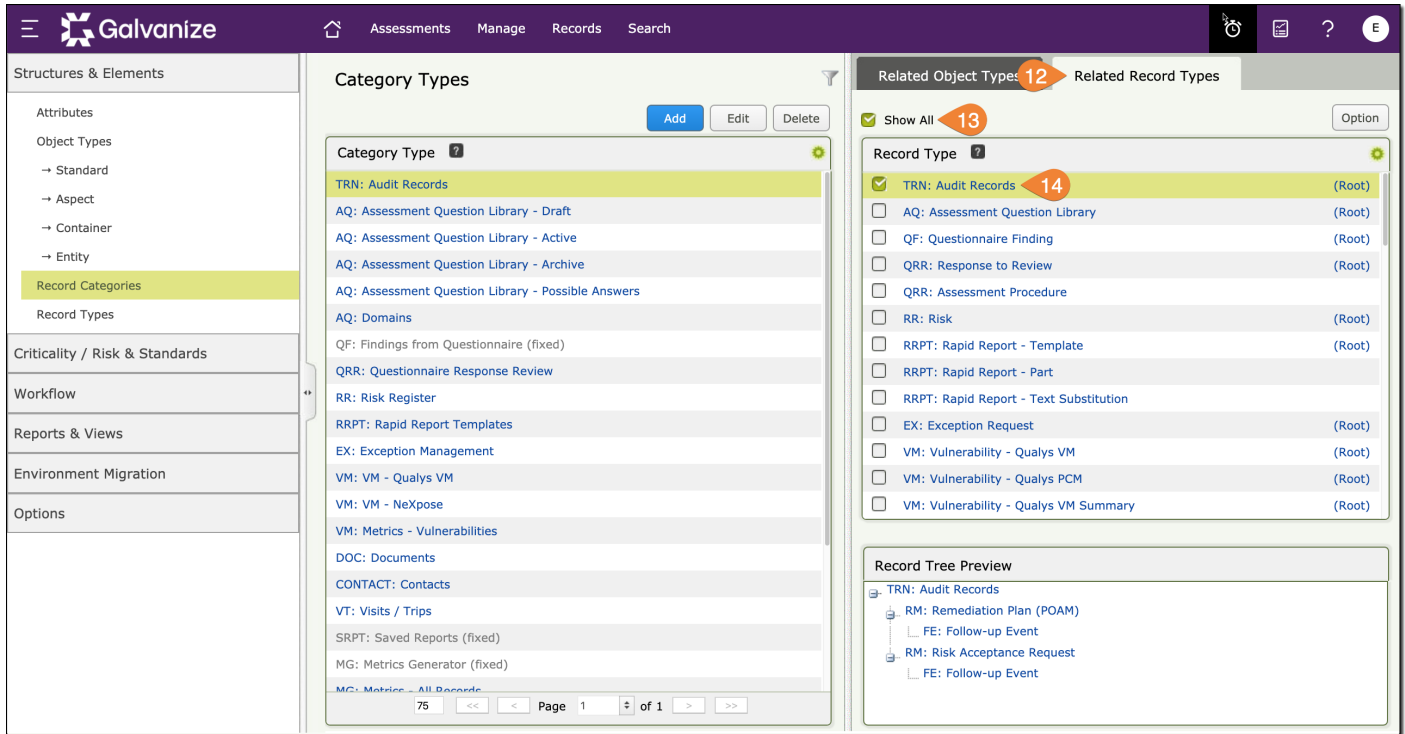
10

Update

Clear All Selection(s)

Cancel

12. Click on the **Related Record Types** tab
13. Check **Show All**
14. Check the Record Types: **TRN: Audit Record**
15. On the pop up (See figure below), leave the default options in place and click **Save**



The screenshot shows the Galvanize interface with the 'Category Types' and 'Related Record Types' sections. The 'Related Record Types' tab is active, showing a list of record types. The 'Show All' button is highlighted with a red circle and the number 13. The 'Record Tree Preview' section shows a hierarchy of record types.

Category Type --> Record Type

Self-Registration option:

☒ Apply all related child record types as well

15
Save
Close

Stop Here

- Take a Break
- Next Session Continues Shortly