



Basic Administrator Training

Exercise: 7  
Configuring Searches, Charts &  
Home Pages

## Version Information

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Version	Date Released	Notes
2019-1	Jan 4 <sup>th</sup> 2019	Updated Format
2019-2	May 20 <sup>th</sup> 2019	Re-Branded to meet Galvanize design guidelines
2020-1	Feb 4 <sup>th</sup> 2020	Updated Screenshots after Version 10 Update

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## Overview

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This document will guide you through creating a data search in Rsam, generating a Chart based on the results, and applying it to a Rsam Home Page. This tutorial assumes that the user has a basic knowledge of the Records module and Rsam Administration.

### Pre-Requisites

This tutorial assumes you have some existing records in your instance of Rsam. It was written from a neutral perspective with the understanding that each customer will have their own unique records in their Rsam instance.

### Login

When using this tutorial, you should login as a user with account type of Data Administrator or Account Administrator. While standard users can build searches and charts, a Data Administrator level or higher user type is required to create Rsam Home Pages.

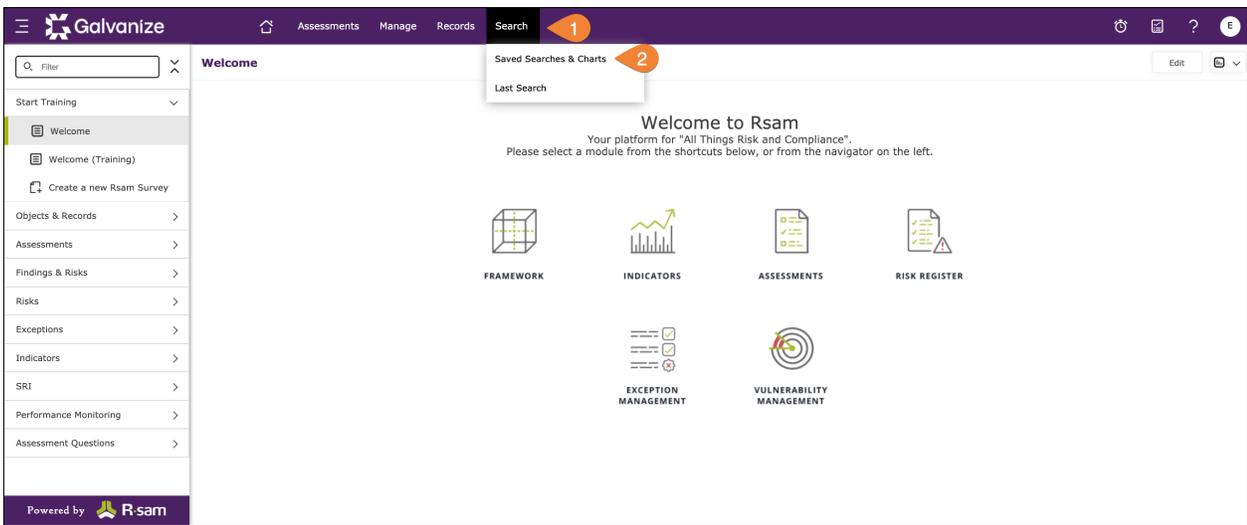
## Session 1: Creating and Saving a Search

### Creating a Search

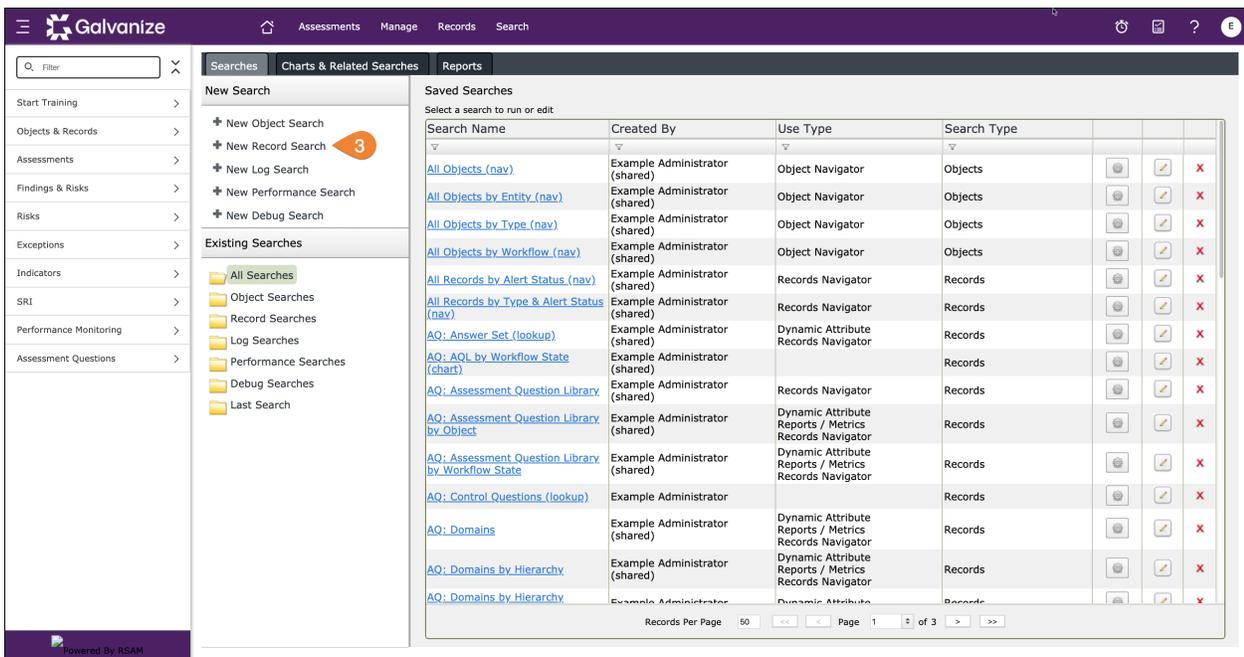
Make sure that pop up blockers are disabled as the search needs to open a new window to

Steps to Follow:

1. Select Search
2. Select Saved Searches & Charts



3. Select New Record Search



4. Click the drop-down arrows next to **Quick Search**
5. Click Audit Records

Select the fields to include into your search. You can set order, sorting and grouping as well as filters

Quick Search Switch to Advanced Mode

Audit Records

Assessment Library Question

Questionnaire Finding

Response to Review

Assessment Procedure

Risk

Rapid Report - Template

Rapid Report - Part

Rapid Report - Text Substitution

Exception Request

Vulnerability - Qualys VM

Vulnerability - Qualys PCM

Vulnerability - Qualys VM Summary

Vulnerability - Qualys Tickets

McAfee Vulnerability Manager

Vulnerability - AppScan

	Display Order	Field Filter
Record Category	1	
Record Type	2	
Record Workflow State	3	
Object Name	4	

Attribute Types:  Sort alphabetically  Limit to selected Object Types/Record Types and ancestors

Update Cancel

6. Your screen will look similar to the diagram below
7. Click **Update**

Select the fields to include into your search. You can set order, sorting and grouping as well as filters

Quick Search Switch to Advanced Mode

Audit Records

Field Type	Field	Display Order	Field Filter
Record Fields	Record Category	1	
Record Fields	Record Type	2	Audit Records
Record Fields	Record Workflow State	3	
Object Fields	Object Name	4	
Record Attribute	Management Risk Rating	5	
Record Attribute	Audit Record ID	6	
Record Attribute	Audit Type	7	
Record Attribute	Date of Record	8	
Record Attribute	Audit Record Description	9	

Attribute Types:  Sort alphabetically  Limit to selected Object Types/Record Types and ancestors

Update Cancel

8. Click and drag the heading **Management Risk Rating** to the green pivot area

Record Category	Record Type	Record Workflow State	Object Name	Management Risk Rating	Audit Record ID	Audit Type	Date of Record	Audit Record Description
Audit Records	Audit Records	Open	Global Records	1. Very Low	1	Corporate Policy	2013-02-15	Developers have ad... both test and Product environments without change management
Audit Records	Audit Records	Open	Global Records	2. Low	2	Corporate Policy	2013-02-28	Security Policies that published have not y... approved.
Audit Records	Audit Records	Open	Global Records	3. Medium	3	Corporate Policy	2013-03-11	Passwords currently r... expire. They are requ... changed every 90 da...
Audit Records	Audit Records	Open	Global Records	1. Very Low	4	Regulatory	2013-03-21	An entitlement review been done for the pa... application.
Audit Records	Audit Records	Open	Global Records	4. High	5	Regulatory	2013-03-21	IDs are not being del... employees leave the
Audit Records	Audit Records	Open	Global Records	4. High	6	Corporate Policy	2013-03-23	Workstations in sect... not automatically loci
Audit Records	Audit Records	Open	Global Records	3. Medium	7	Corporate Policy	2013-04-01	Developers have ad... both test and Product environments without change management
Audit Records	Audit Records	Open	Global Records	3. Medium	8	Corporate Policy	2013-04-16	Security Policies that published have not y... approved.
Audit Records	Audit Records	Open	Global Records	1. Very Low	9	Corporate Policy	2013-05-02	Passwords currently r... expire. They are requ... changed every 90 da...
Audit Records	Audit Records	Open	Global Records	2. Low	10	Regulatory	2013-05-12	An entitlement review been done for the pa... application.
Audit Records	Audit Records	Open	Global Records	1. Very Low	11	Regulatory	2013-05-12	IDs are not being del... employees leave the
Audit Records	Audit Records	Open	Global Records	5. Severe	12	Corporate Policy	2013-05-25	Workstations in sect... not automatically loci

9. Select one of the rating in the **Select a group** area (Very Low, Low, Medium, High or Severe)

10. Click and drag **Audit Type** to the green pivot area as you did in step 8

**Select a group**

- 1. Very Low (4) 9
- 2. Low (3)
- 3. Medium (5)
- 4. High (4)
- 5. Severe (2)

Results: 4 of 18

**Management Risk Rating**

Record Category	Record Type	Record Workflow State	Object Name	Audit Record ID	Audit Type	Date of Record	Audit R
Audit Records	Audit Records	Open	Global Records	1	Corporate Policy	2013-02-15	Develo... both te... environ... change
Audit Records	Audit Records	Open	Global Records	4	Regulatory	2013-03-21	An ent... been d... applica...
Audit Records	Audit Records	Open	Global Records	9	Corporate Policy	2013-05-02	Passw... expire... change
Audit Records	Audit Records	Open	Global Records	11	Regulatory	2013-05-12	IDs are... employ

Records Per Page 50 Page 1 of 1

11. Your **Audit Records** will now have been sorted first by **Management Risk Rating** and then by **Audit Type**

The screenshot shows the Galvanize interface with search results for 'Audit Records'. The results are sorted by Management Risk Rating (Very Low, Low, Medium, High, Severe) and then by Audit Type (Corporate Policy, Regulatory). The table below represents the data shown in the screenshot.

Record Category	Record Type	Record Workflow State	Object Name	Audit Record ID	Audit Type	Date of Record	Audit R
Audit Records	Audit Records	Open	Global Records	1	Corporate Policy	2013-02-15	Develo both te enviroir change
Audit Records	Audit Records	Open	Global Records	9	Corporate Policy	2013-05-02	Passwd expire. change
Audit Records	Audit Records	Open	Global Records	11	Regulatory	2013-05-12	IDs are employ
Audit Records	Audit Records	Open	Global Records	4	Regulatory	2013-03-21	An enti been di applica

Results: 4 of 18

Records Per Page: 50 | Page 1 of 1

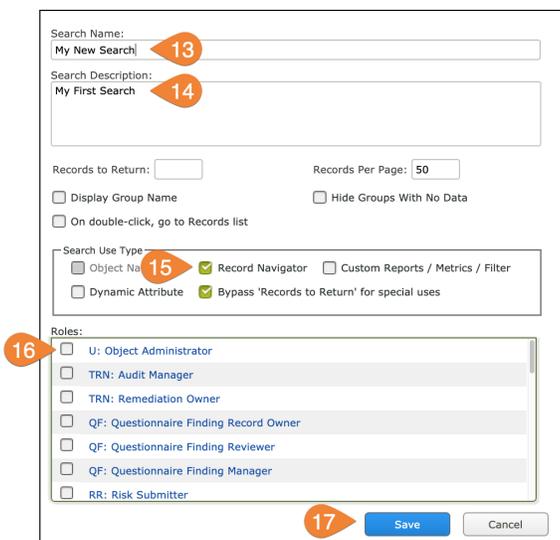
## Saving a Search

Search Criteria can be saved and reused at a later date. There are several areas where Rsam allows you to use your saved searches.

- You can choose to load your search again at a later date.
- Administrators can choose to publish saved searches to allow users with specific Rsam roles to make use of them.
- Administrators can also choose to publish saved searches into the Rsam Home pages, making them active content for other users.
- Saved searches can be used to generate charts

### Steps to Follow

12. Click on the **Save Search As** button
13. Enter the Search name **My New Search**
14. Provide an optional description in the **Search Description** box
15. Check the box next to **Record Navigator'**
16. Click the U: Object Administrator role
  - a) You will be prompted to **Save**
  - b) Click **Yes**
  - c) For the permission select **Edit**
  - d) Click **Save**
17. Click on **Save**



The screenshot shows a 'Save Search As' dialog box with the following fields and options:

- Search Name:** A text input field containing 'My New Search' with callout 13.
- Search Description:** A text input field containing 'My First Search' with callout 14.
- Records to Return:** An empty input field.
- Records Per Page:** A dropdown menu set to '50'.
- Display Group Name
- Hide Groups With No Data
- On double-click, go to Records list
- Search Use Type:**
  - Object Name
  - Record Navigator (callout 15)
  - Custom Reports / Metrics / Filter
  - Dynamic Attribute
  - Bypass 'Records to Return' for special uses
- Roles:** A list of roles with checkboxes:
  - U: Object Administrator (callout 16)
  - TRN: Audit Manager
  - TRN: Remediation Owner
  - QF: Questionnaire Finding Record Owner
  - QF: Questionnaire Finding Reviewer
  - QF: Questionnaire Finding Manager
  - RR: Risk Submitter
- Buttons:** A blue 'Save' button (callout 17) and a grey 'Cancel' button.

18. Delete the pivot points on the current chart by clicking the white X next to Audit Type and Management Risk Rating



19. Create a new set of search parameters as you did in steps 8 through 11.
20. Save this new Search following steps 12 through 17.

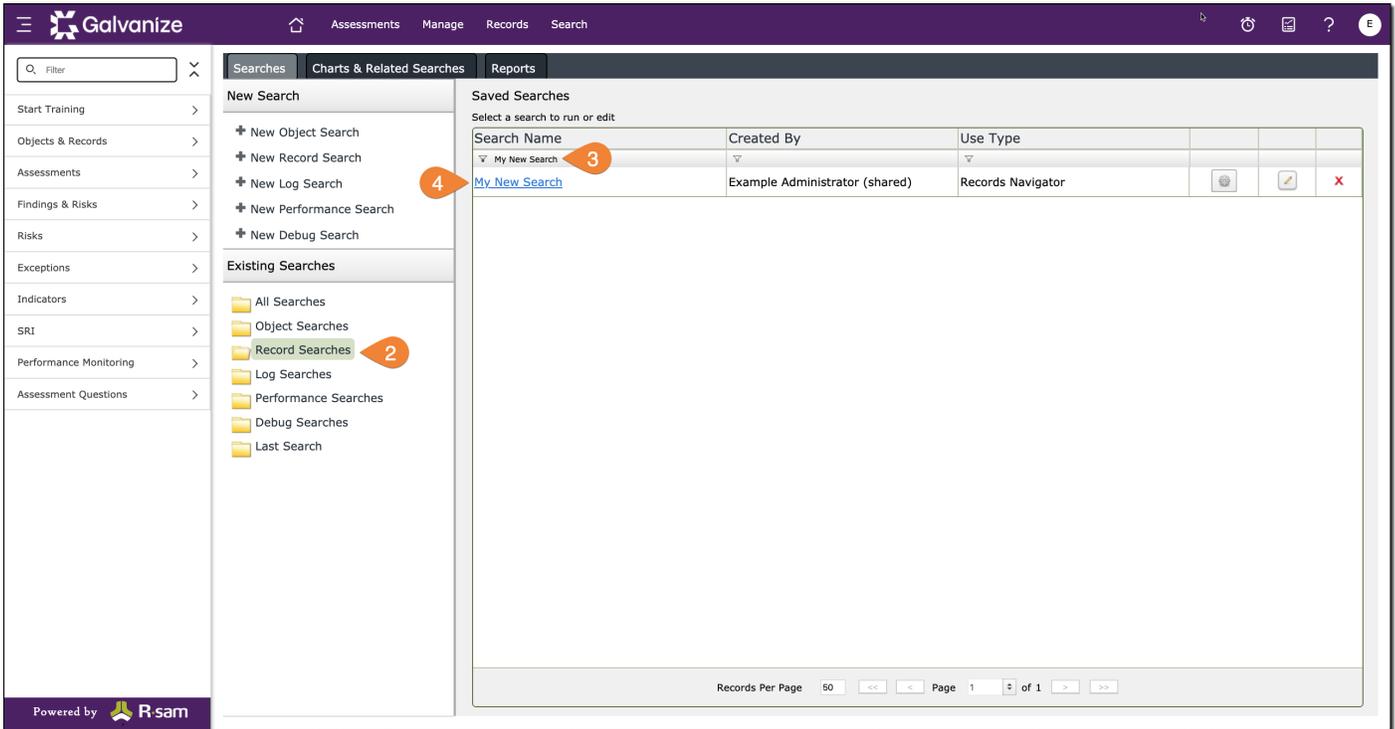
## Creating and Saving a Chart

Use the following steps to create a chart based on an existing search. Please note that you must first have successfully created a search and applied one or more groupings before you can complete this step.

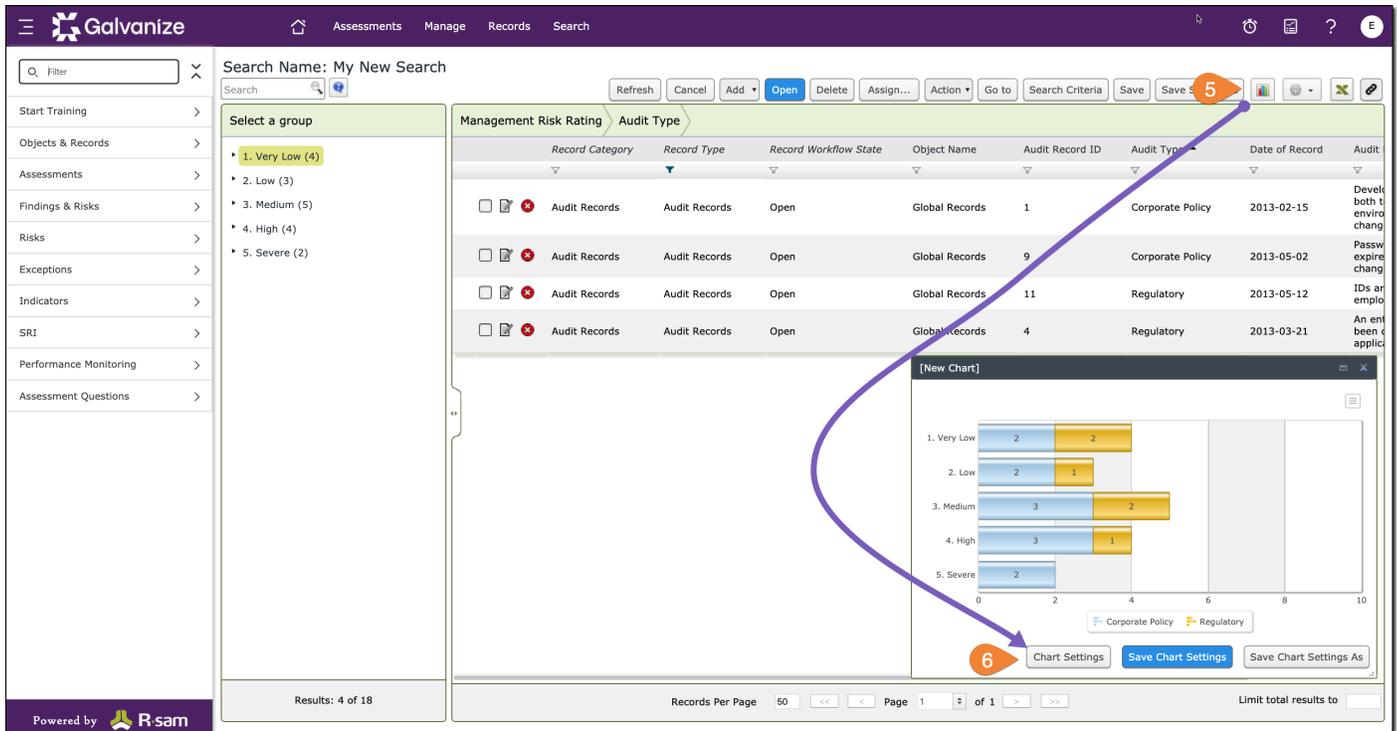
Rsam's powerful drag-and-drop charting feature allows you to create, load, and save charts "on-the-fly". The charting system is directly integrated in the Rsam search feature allowing you to take advantage of the filter and grouping capabilities described in the previous section.

Steps to Follow:

1. Open up the first search you created. Click **Search**, followed by **Saved Searches and Chart**
2. Select Record Searches under the Existing Searches Menu
3. Enter **My New Search** next to the funnel under Search Name and press Enter
4. Click **My New Search**. Your search results will now be back on screen.



- Click on the **Charting Icon**
- Click on the **Chart Settings** button when the **New Chart** window appears.



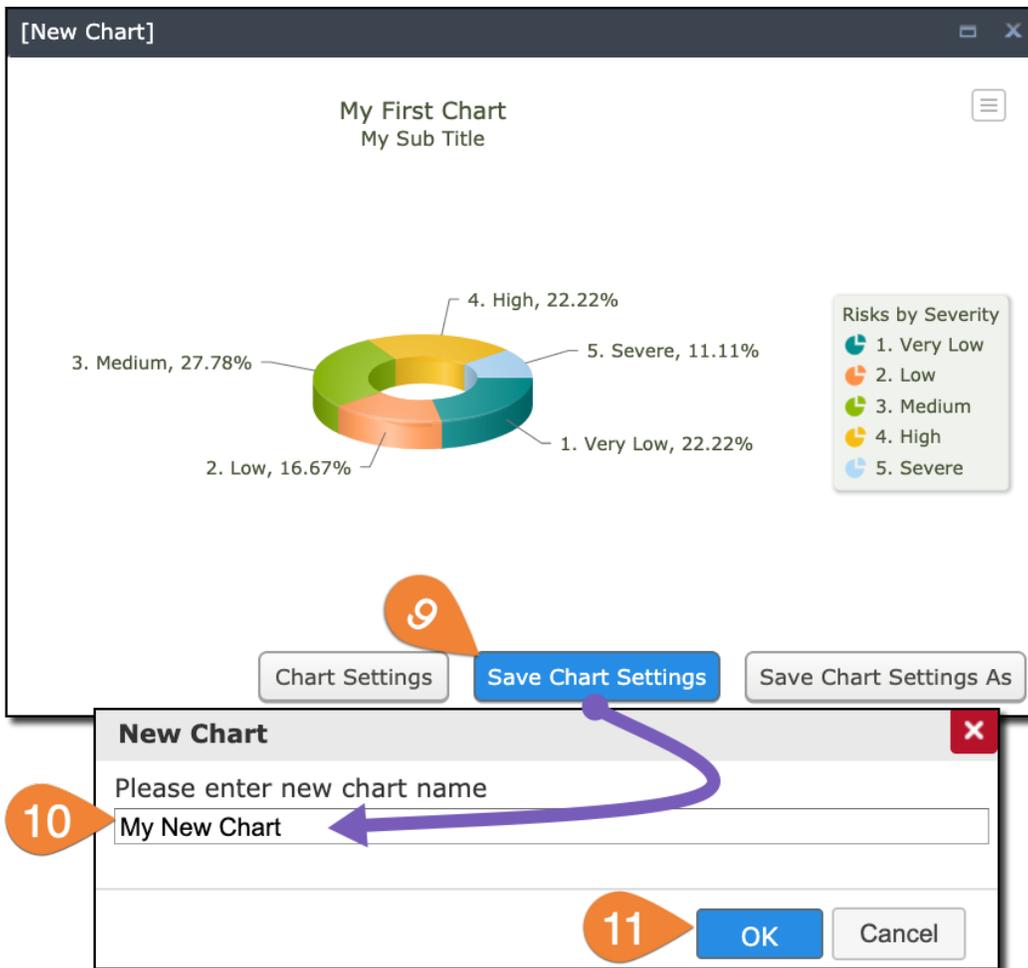
- Use the table below or your own values to create your chart

Tab	Option	Selection
Chart Type	Chart Type	Doughnut (3D)
Title	General – Title text	My First Chart
Title	Sub Title – Title Text	My Sub Title
Legend	Title	Risks by Severity
Legend	Placement	Right
Label	Show Values as Percentage	Checked

- Click **OK** to apply all of the settings you made.

Clicking Apply after you make a change will automatically update the chart and show you what that value / option looks like.

- Click on the **Save Chart Settings** button
- Name the chart **My New Chart**
- Click **OK**
- Now add the two saved searches to your Administrator group.



The screenshot shows a software interface for creating a new chart. The main window, titled "[New Chart]", displays a donut chart titled "My First Chart" with the subtitle "My Sub Title". The chart is divided into five segments representing risk severity levels: 1. Very Low (22.22%), 2. Low (16.67%), 3. Medium (27.78%), 4. High (22.22%), and 5. Severe (11.11%). A legend titled "Risks by Severity" lists these categories with corresponding colored circles. Below the chart are three buttons: "Chart Settings", "Save Chart Settings" (highlighted with a blue callout bubble labeled '9'), and "Save Chart Settings As".

Overlaid on the bottom of the main window is a smaller dialog box titled "New Chart". It contains the text "Please enter new chart name" and a text input field with the value "My New Chart" (highlighted with a blue callout bubble labeled '10'). At the bottom of the dialog are "OK" and "Cancel" buttons (the "OK" button is highlighted with a blue callout bubble labeled '11'). A purple arrow points from the "Save Chart Settings" button in the main window to the "OK" button in the dialog box.

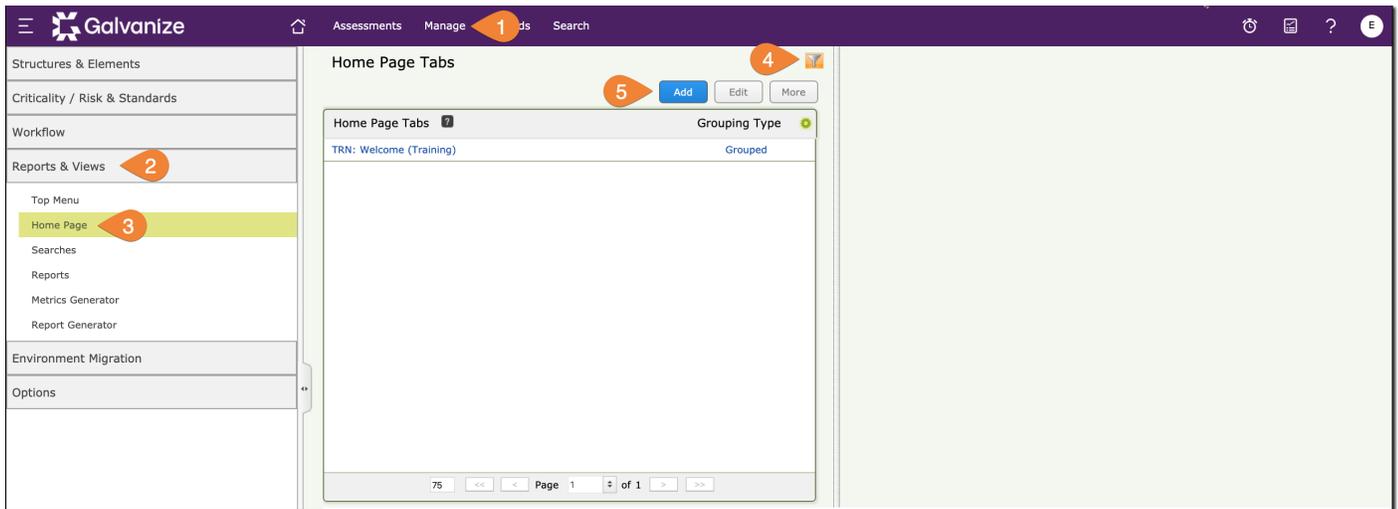
Severity	Percentage
1. Very Low	22.22%
2. Low	16.67%
3. Medium	27.78%
4. High	22.22%
5. Severe	11.11%

## Placing Search Results & Charts (Dashboards) on a Home Page Tab

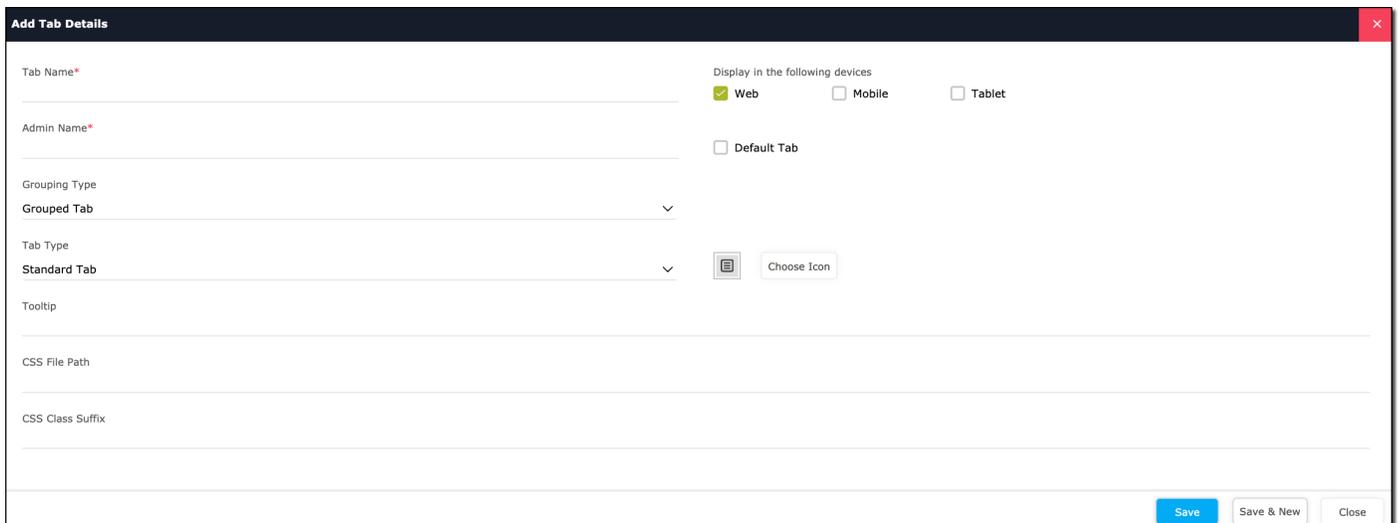
Once you have created and saved a related search and chart, you can place the chart on a home-page tab. In this example, we will create a new grouping home page and two new grouped tabs. To perform this step by using the Web Administration screen.

### Steps to Follow

1. Select Manage → Administration
2. Expand Reports & Views
3. Select Home Page
4. Ensure that you have enabled Administrator filters.
5. In the **Home Page** tab, select **Add**



6. The following will appear:



7. Use the following table to enter values for your **grouping** home page.

Fields	Values
Tab Name	My Home Pages
Admin Name	TRN: My Home Pages
Grouping Type	Grouping Tab
Tab Type	Standard Tab
Tool Tip	My personal home pages
CSS File Path	
CSS Class Suffix	
Display in the following devices	Web
<input checked="" type="checkbox"/> <b>Default Tab</b>	<b>Check this option</b> (This will assign the Home Page to all Roles) Rsam will ask you to confirm this action. Select <b>“Yes”</b>
Self Registration Links (Add New)	Add <b>TRN: Audit Records: TRN: Audit Records</b> (Click Magnifying icon to bring up selection)

8. Click Save & New

9. Use the table below and follow the same process to enter a **grouped** tab

Fields	Values
Tab Name	My Dashboard
Admin Name	TRN: My Dashboard
Grouping Type	Grouped Tab
Tab Type	Standard Tab
Tool Tip	My dashboard page
CSS File Path	
CSS Class Suffix	
<input checked="" type="checkbox"/> <b>Default Tab</b>	<b>Check this option</b> (This assigns this Home Page to all Roles) Rsam will ask you to confirm this action. Select <b>“Yes”</b>

10. Click Save & New

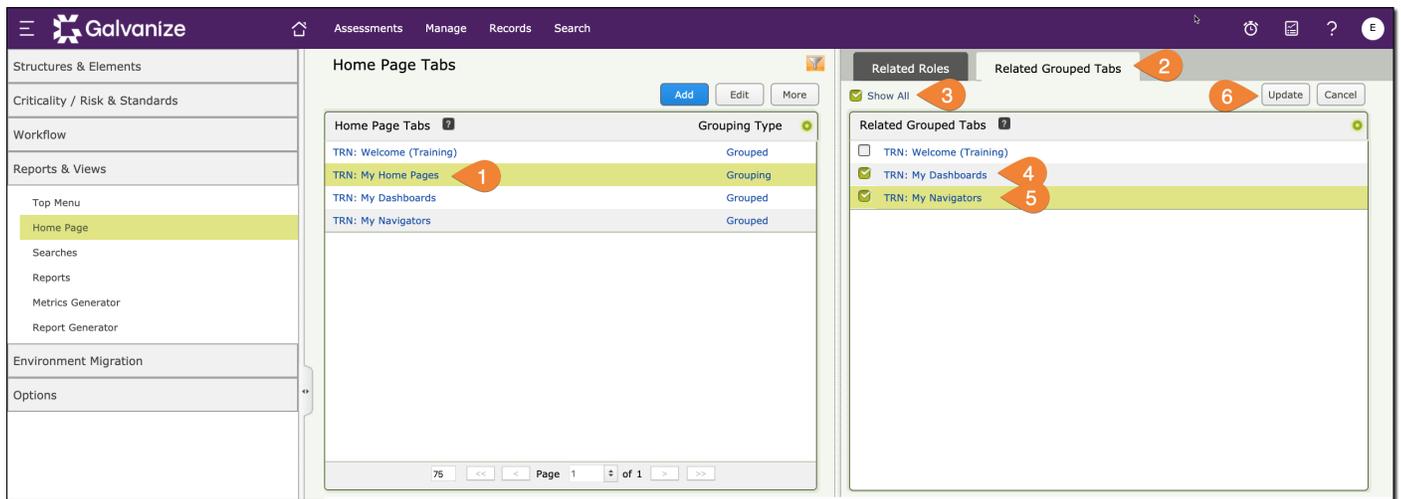
11. Use the table below and follow the same process to enter a **Navigator** tab

Fields	Values
Tab Name	My Navigator
Admin Name	TRN: My Navigator
Grouping Type	Grouped Tab
Tab Type	Record Navigator Tab
Search Name	Click the magnifying icon, Select <b>My Audit Search</b> and <b>Your other named Search</b> , then click <b>Update</b>
Tool Tip	My Navigators
CSS File Path	
CSS Class Suffix	
<input checked="" type="checkbox"/> <b>Default Tab</b>	<b>Check this option</b> (This assigns this Home Page to all Roles) Rsam will ask you to confirm this action. Select <b>"Yes"</b>

## Relate Grouping Tabs to Grouped Tabs

Now that we have created and configured Grouping Tabs, as with most items in Rsam, we need to link them.

1. Select TRN: My Home Pages
2. On the right-hand menu, select **Related Group Tabs**
3. Make Sure that **Show All** is checked
4. Check TRN: My Dashboard
5. Check TRN: My Navigator
6. Click Update



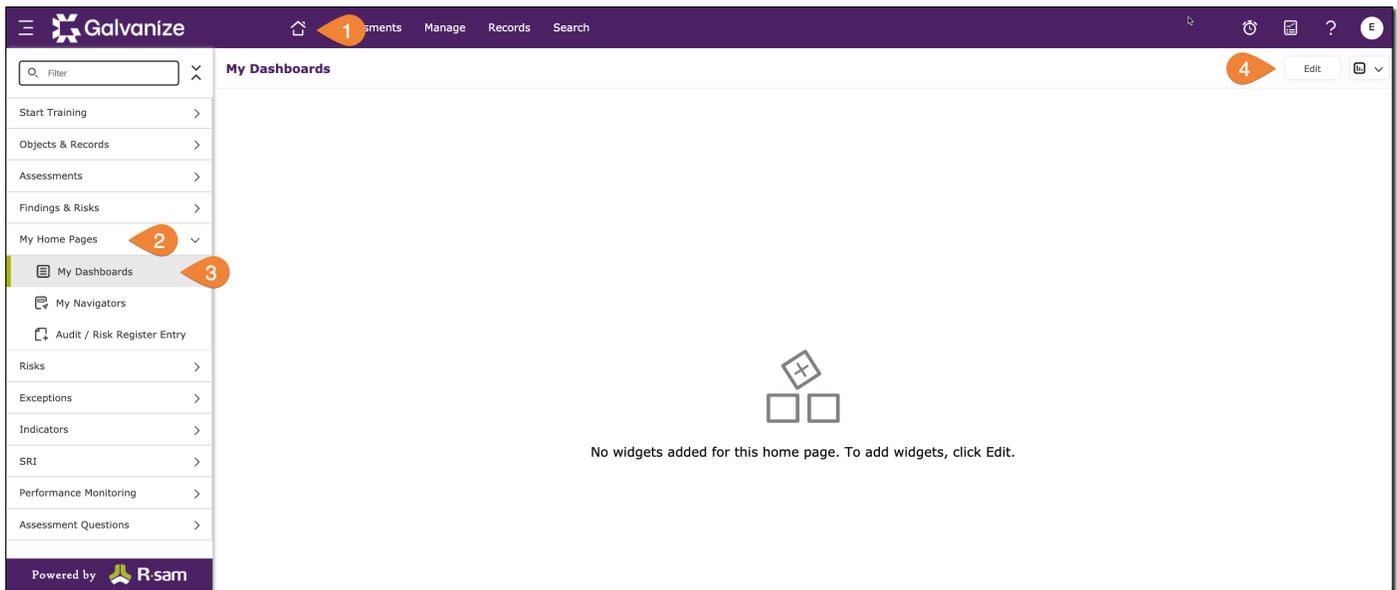
The screenshot shows the Galvanize interface with the following components and callouts:

- Home Page Tabs:** A table with columns 'Home Page Tabs' and 'Grouping Type'. The row 'TRN: My Home Pages' is highlighted and marked with callout 1.
- Related Roles / Related Grouped Tabs:** A panel on the right with a 'Show All' checkbox (callout 3) and an 'Update' button (callout 6).
- Related Grouped Tabs:** A list of items with checkboxes. 'TRN: My Dashboards' (callout 4) and 'TRN: My Navigators' (callout 5) are checked.

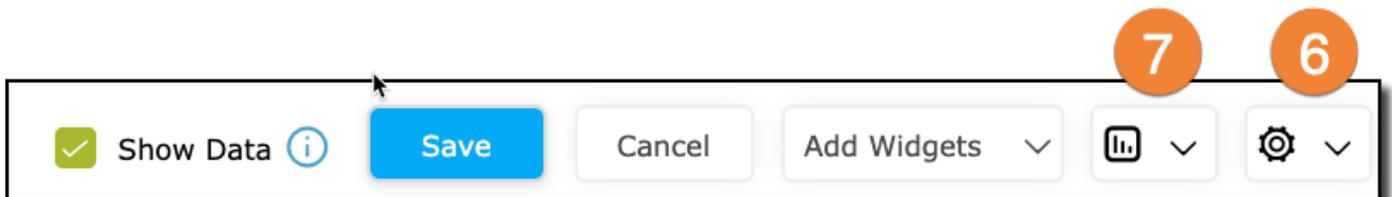
## Configuring Home Pages

With version 10, configuration of home pages can now be performed on the page directly. Note that the page itself must exist prior to any configuration work.

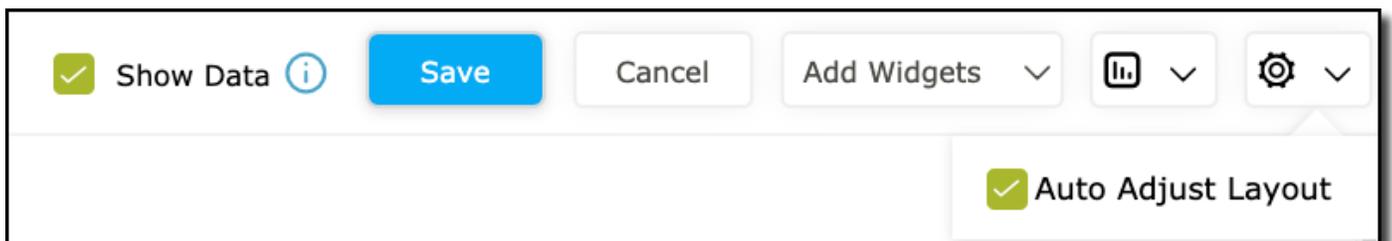
1. Click the **Home** icon
2. Expand My Home Pages
3. Select My Dashboards
4. Click **Edit**



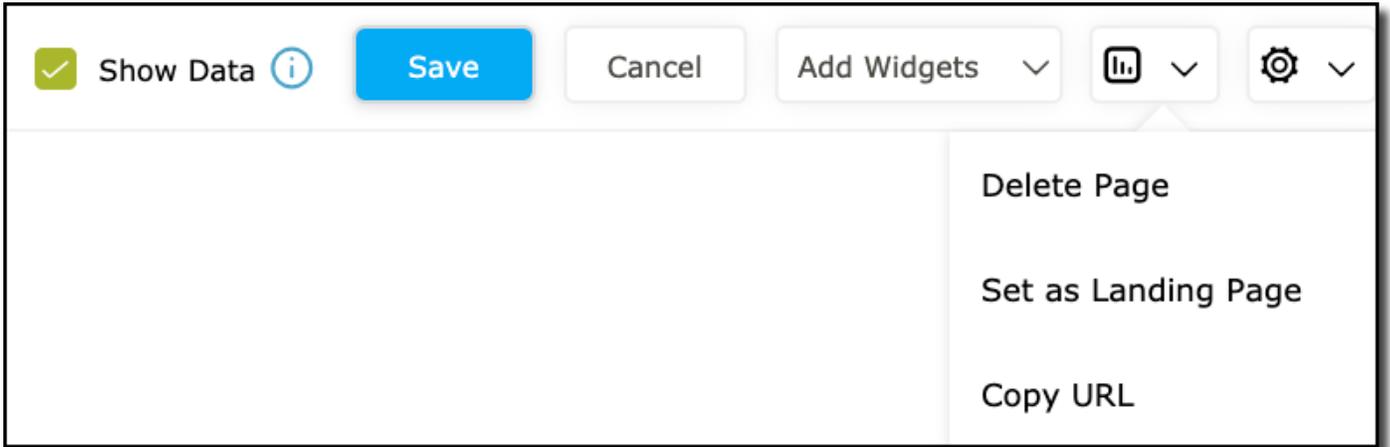
5. The following menu will appear



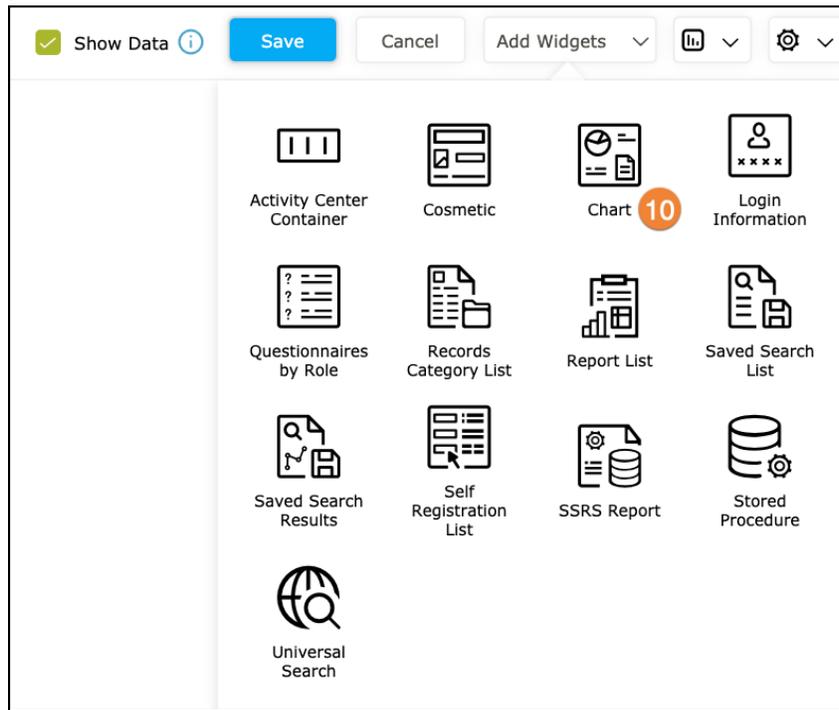
6. This option allows you to set **Auto Adjust** on or off. When switched off you can make very fine adjustment in placement for your widgets. Note that it must be switched on if you plan to add an Activity Center to your Home Page.



- This option allows you to **Delete** the page. Note that creation of pages must be done via the admin screen. You can set this page as your **Landing Page** and you can **Copy the URL** and send it someone else for direct access.

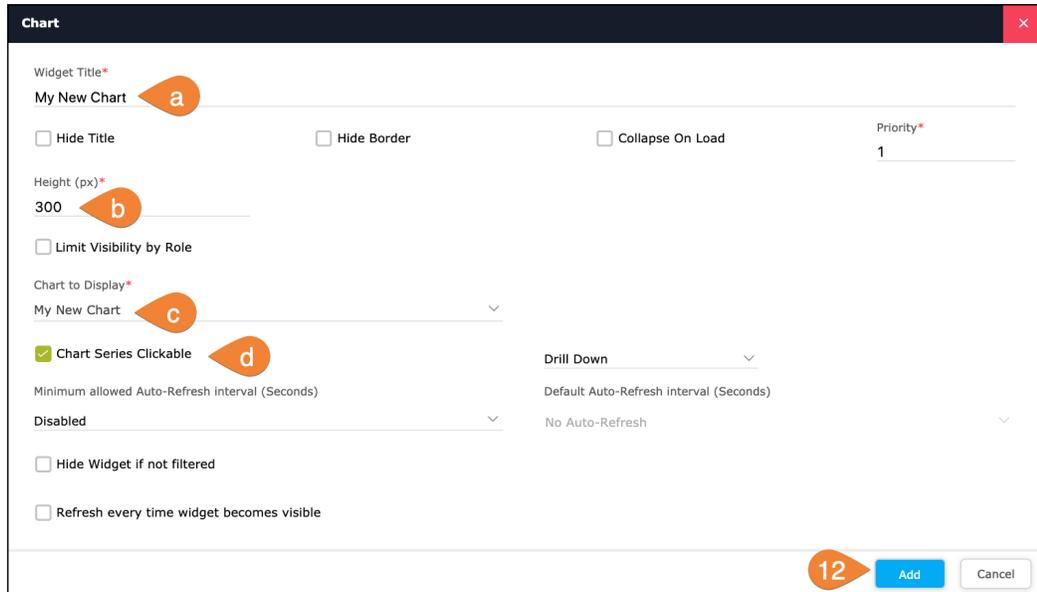


- Let's add some widgets to the Home Page
- Click Add Widgets
- Drag the **Chart** widget to the top of the page



- The configuration screen will open automatically. Use the following table to enter the default values:
  - Widget Title: **My New Chart**
  - Height: **300**
  - Chart to Display: Select your saved chart **"My New Chart"**
  - Chart Series Clickable: Selected

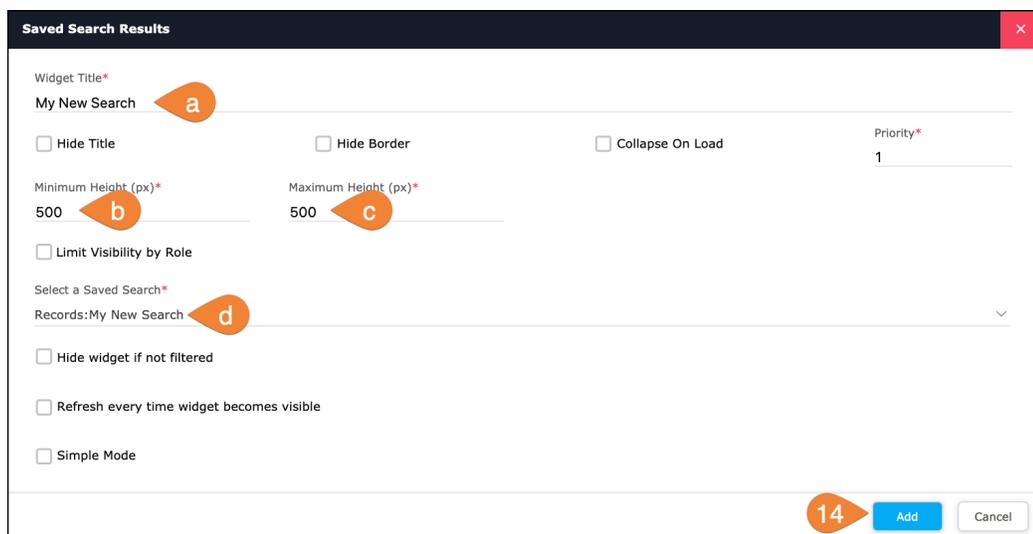
12. Click **Add**



13. Repeat this process but add a **Saved Search Results** widget

- a. Widget Header: **My New Search**
- b. Minimum Height: **500**
- c. Maximum Height: **500**
- d. Select a Saved Search: **Search for "Records: My New Search"**

14. Click **Add**

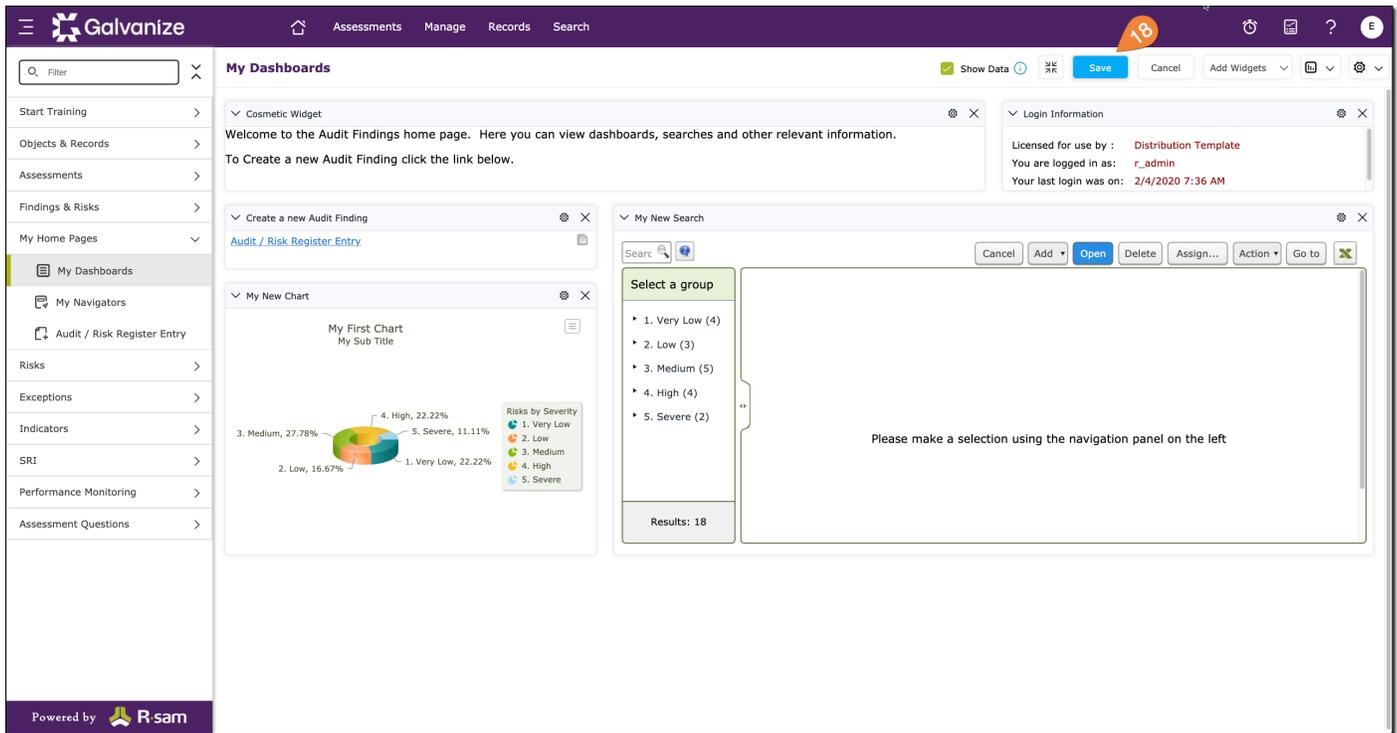


15. Click **Add**

16. Optional: Repeat the process but add a Login Information widget, a Cosmetic widget and a Self Registration List.

17. Design your home page by dragging, dropping, and resizing your widgets. Try designing with both Auto-Adjust on and off.

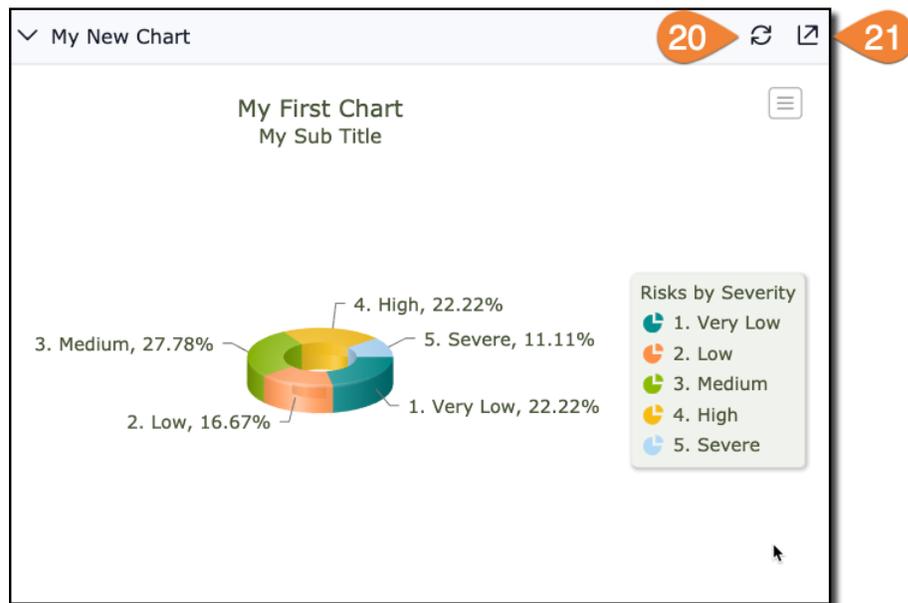
18. Once you are happy with your design click **Save** to lock in your changes.



19. Lets explore some other features.

20. You can refresh the information within the widget

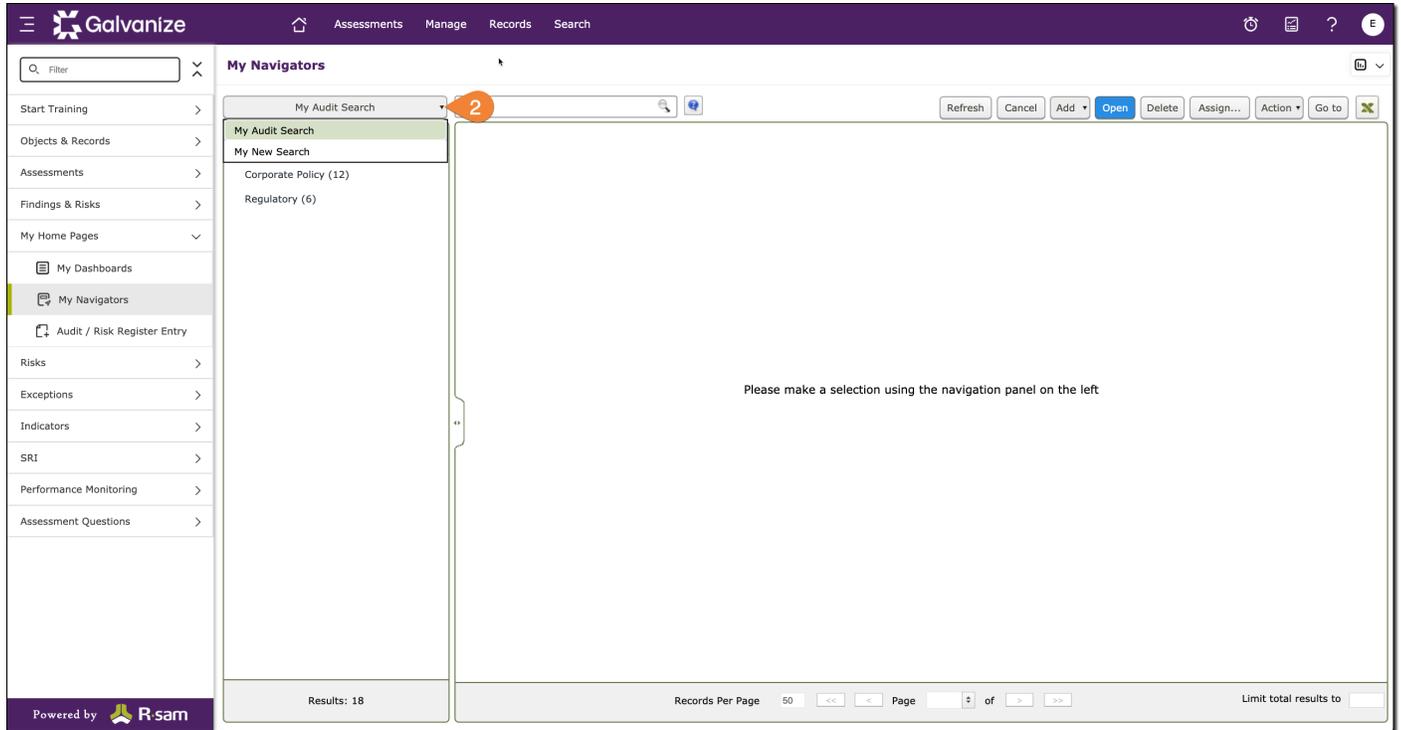
21. You can expand Charts to full screen..



## Review your Navigators

Steps to Follow:

1. Select **my Navigators**
2. Use the drop down arrow to select your Navigator



Stop Here

- Take a Break
- Next Session Continues Shortly