



Basic Administrator Training

Exercise: 6  
Importing Records

## Version Information

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<b>Version</b>	<b>Date Released</b>	<b>Notes</b>
2019.1	Dec 31 <sup>st</sup> 2018	Updated Format.
2019.2	May 20 <sup>th</sup> 2019	Re-Branded to meet Galvanize design guidelines
2020-1	Feb 3 <sup>rd</sup> 202	Updated Screenshots after Version 10 Update

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## Overall Objectives

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- Rsam’s import interface allows customers to import data into records and objects from a variety of data sources. Customers can use the interface to read information from an external data source, map that information to elements within Rsam, and import the data into Rsam.
- This exercise will provide administrators a basic understanding of how to utilize Rsam’s import interface to setup an import of external data into Rsam.

### SCENARIO DESCRIPTION

The scenario is based on the import of legacy Audit Records. Through this process we will configure Rsam to import legacy audit records from an Excel file by:

1. Creating a new Import Profile
2. Mapping fields from Excel to Attributes in Rsam

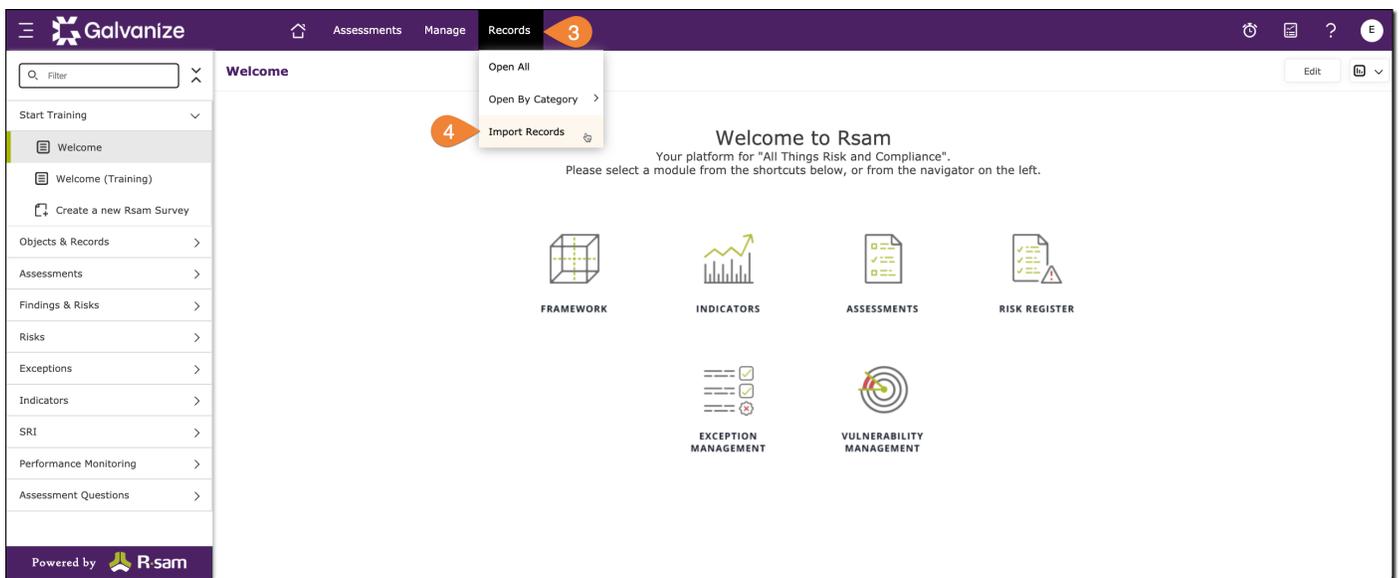
Importing legacy audit records from an Excel file into Rsam Audit Records

## Session 1: Importing Audit Records

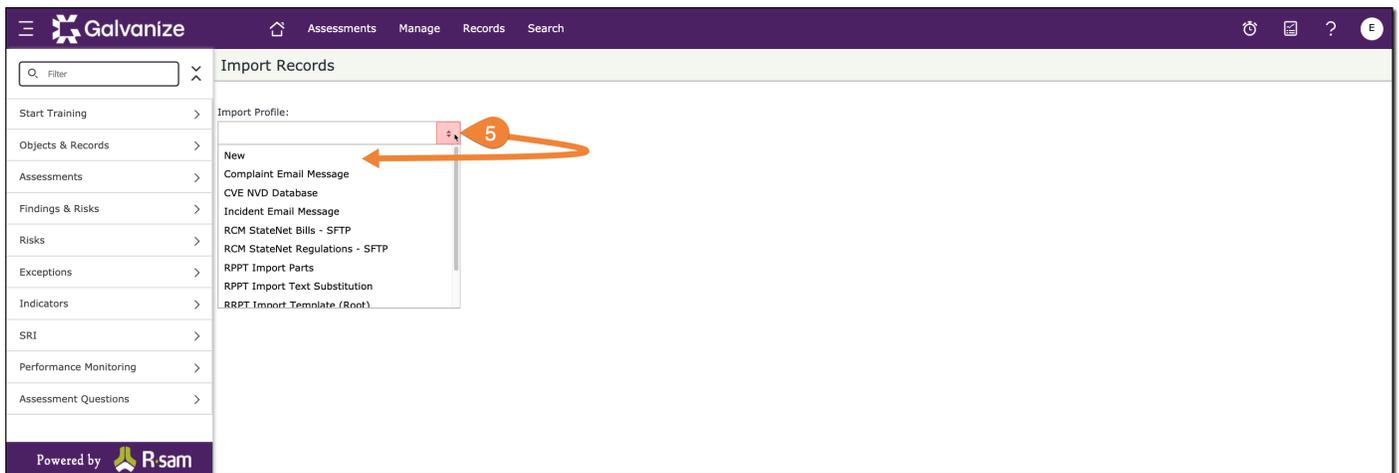
Rather than creating records manually, you will now import them from an Excel sheet. Rsam can import from many data sources, including other applications.

### Steps to Follow

1. Locate the spreadsheet **legacy\_audit\_records.xls** on your drive
2. Login as **r\_admin**
3. Click on **Records**
4. Click **Import Records**



5. Click the list box selector option and choose **New**

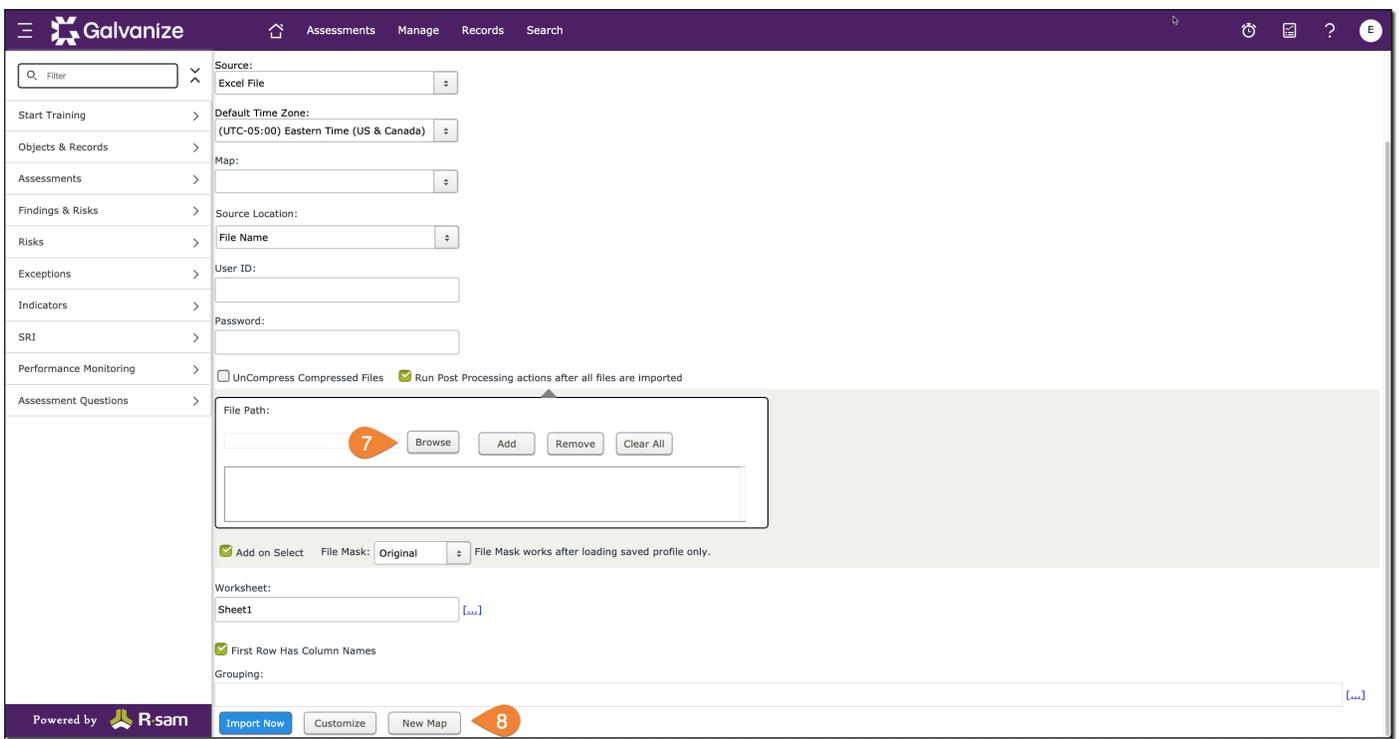


6. Complete this screen following the table below

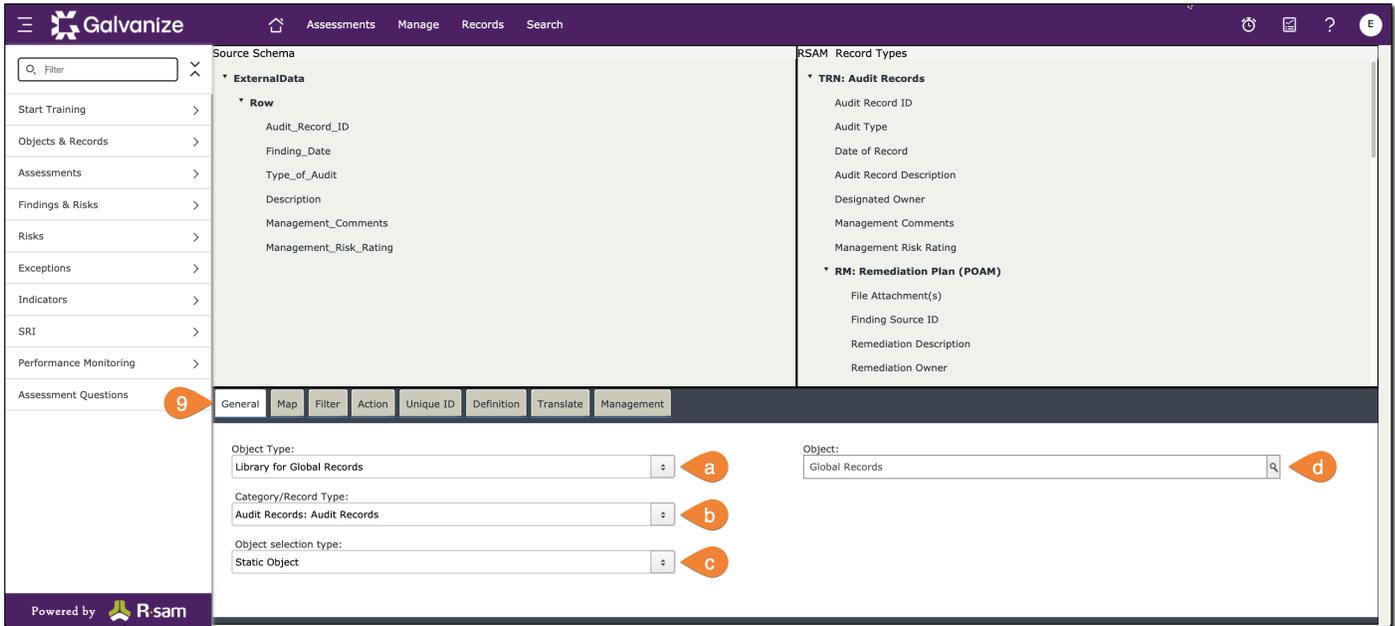
Field	Value
Profile	New
Source	Excel File
Default Time Zone	(UTC -05:00) Eastern Time (US & Canada)
Map	Leave Blank
Source Location	File Name
UserID	Leave Blank
Password	Leave Blank

7. Click on **Browse** to select the required spreadsheet by browsing to its location on your computer

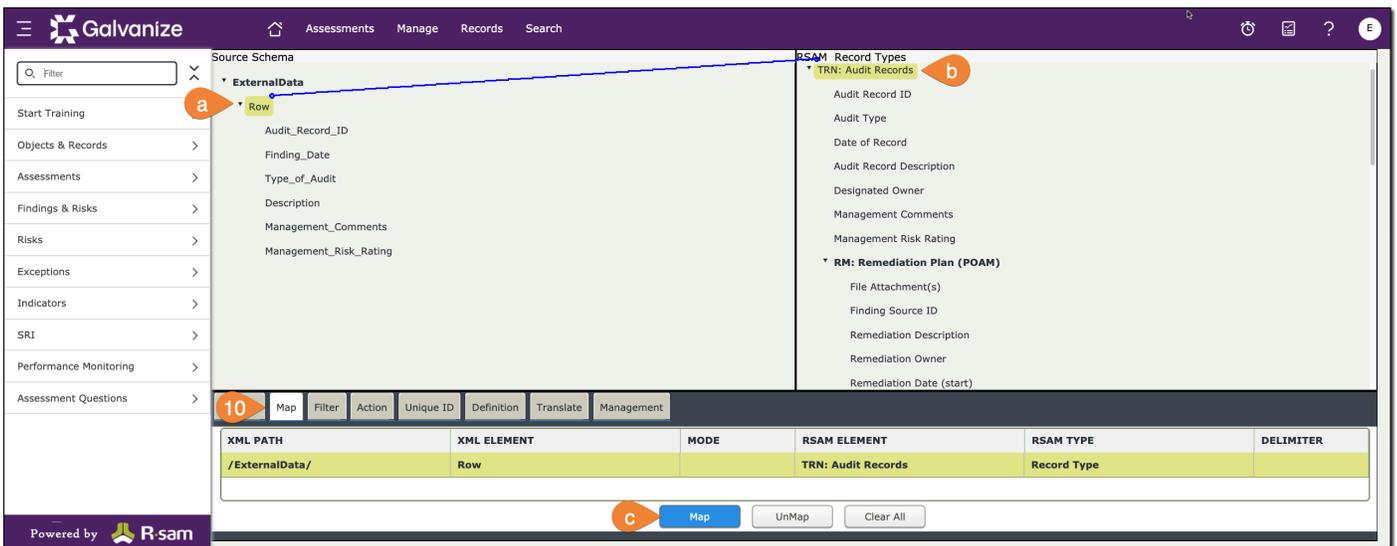
8. Click on **New Map** at the bottom of the screen. You should now see the following window.



9. Using the **General Tab**, make the following selections
  - a. Object Type: **Library for Global Records**
  - b. Category/Record Type: **Audit Records: Audit Records**
  - c. Object Selection Type: **Static Object**
  - d. Object: **Global Records**



10. Using the **Map Tab**, make the following selections by:
  - a. Clicking on an item in the left (**Source Schema**) panel,
  - b. and an item on the right (**Rsam Record Types**) pane,
  - c. and clicking on **Map**



11. Now map each attribute using the table below as the guide

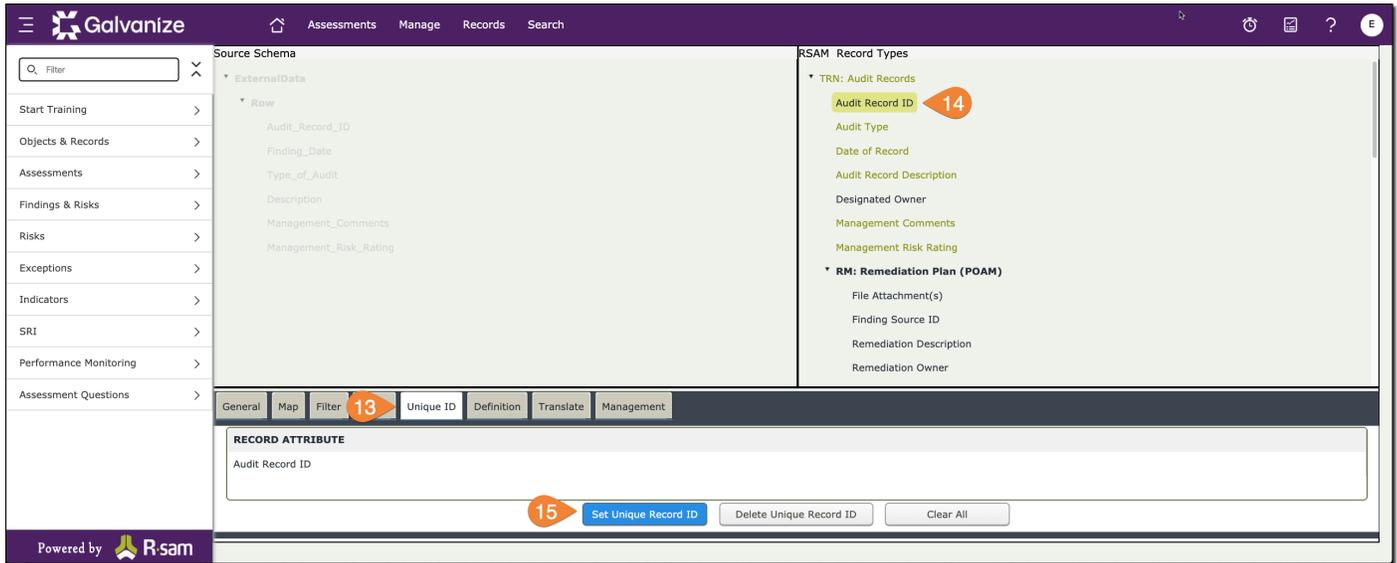
Source Schema	Rsam Record Types
Row	TRN: Audit Record
Audit_ID	Audit Record ID
Finding_Date	Date of Record
Type_of_Audit	Audit Type
Description	Audit Record Description
Management_Comment	Management Comment
Management_Risk_Ratings	Management Risk Rating

12. Your mappings should now look like the diagram below

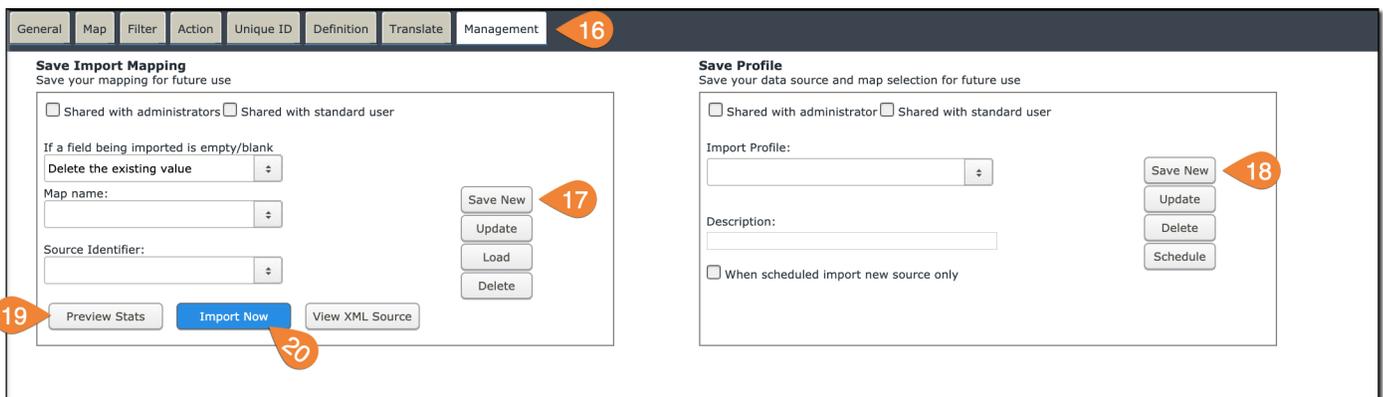
XML PATH	XML ELEMENT	MODE	RSAM ELEMENT	RSAM TYPE	DELIMITER
/ExternalData/	Row		TRN: Audit Records	Record Type	
/ExternalData/Row/	Audit_Record_ID	OVERWRITE	Audit Record ID	Attribute Type	
/ExternalData/Row/	Finding_Date	OVERWRITE	Date of Record	Attribute Type	
/ExternalData/Row/	Type_of_Audit	OVERWRITE	Audit Type	Attribute Type	
/ExternalData/Row/	Description	OVERWRITE	Audit Record Description	Attribute Type	
/ExternalData/Row/	Management_Comments	OVERWRITE	Management Comments	Attribute Type	
/ExternalData/Row/	Management_Risk_Rating	OVERWRITE	Management Risk Rating	Attribute Type	

13. Using the **Unique ID** Tab, specify which attribute(s) should be used as a unique identifier
14. Click on the **Audit Record ID** in the Rsam Record Type tab
15. Click on the **Set Unique Record ID** button

Your screen should now have **Audit Record ID** as a Unique ID Record Attribute



16. Using the **Management Tab**,
17. Click **Save New** (on the **Save Import Mapping** side) and enter **Audit Records Map** as the filename.
18. Click **Save New** (on the **Save Profile** side) and enter **Audit Records Profile** as the filename.
19. Click on **Preview Stats** button in the lower left hand corner of the screen
  - a. If you do not see the expected results, check your Map and your Unique ID
20. Click on the **Import Now** button to execute the import



21. Select Records -> Open by Category -> Audit Records
22. You should now see all of your imported records.

**Stop Here**

- Take a Break
- Next Session Continues Shortly