



Basic Administrator Training

Exercise: 6
Importing Records

Version Information

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

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Overall Objectives

- 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

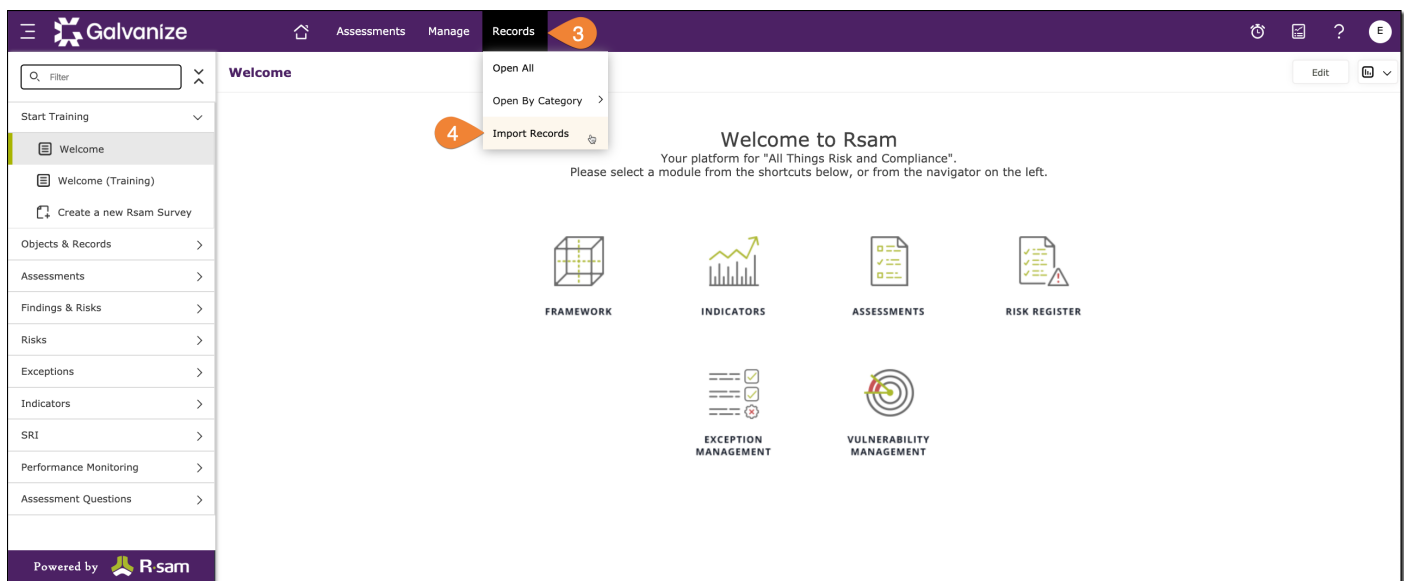
Importing legacy audit records from an Excel file into Rsam Audit Records

Session 1: Importing Audit Records

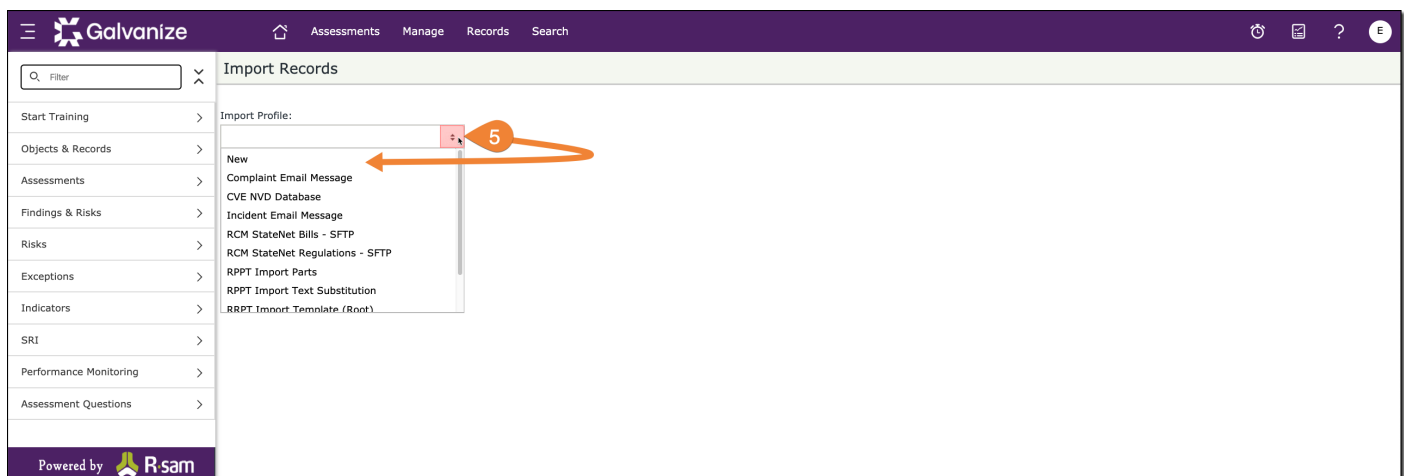
Rather than creating records manually, you will now import them from an Excel sheet. Rsam can import from many data sources, including other applications.

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**

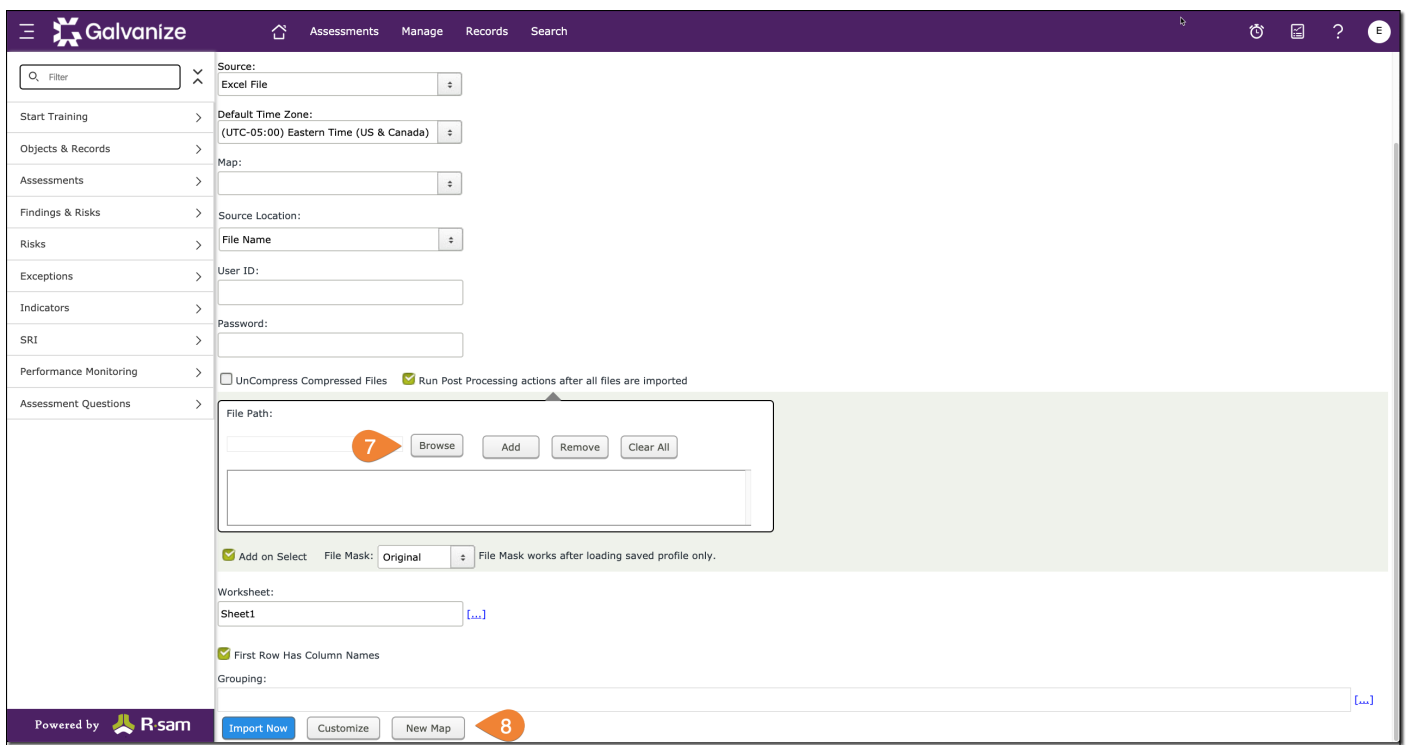


6. Complete this screen following the table below

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.



Galvanize

Assessments Manage Records Search

Filter

Start Training

Objects & Records

Assessments

Findings & Risks

Risks

Exceptions

Indicators

SRI

Performance Monitoring

Assessment Questions

Source: Excel File

Default Time Zone: (UTC -05:00) Eastern Time (US & Canada)

Map:

Source Location: File Name

User ID:

Password:

☐ UnCompress Compressed Files ☒ Run Post Processing actions after all files are imported

File Path:

7 Browse Add Remove Clear All

☒ Add on Select File Mask: Original File Mask works after loading saved profile only.

Worksheet: Sheet1

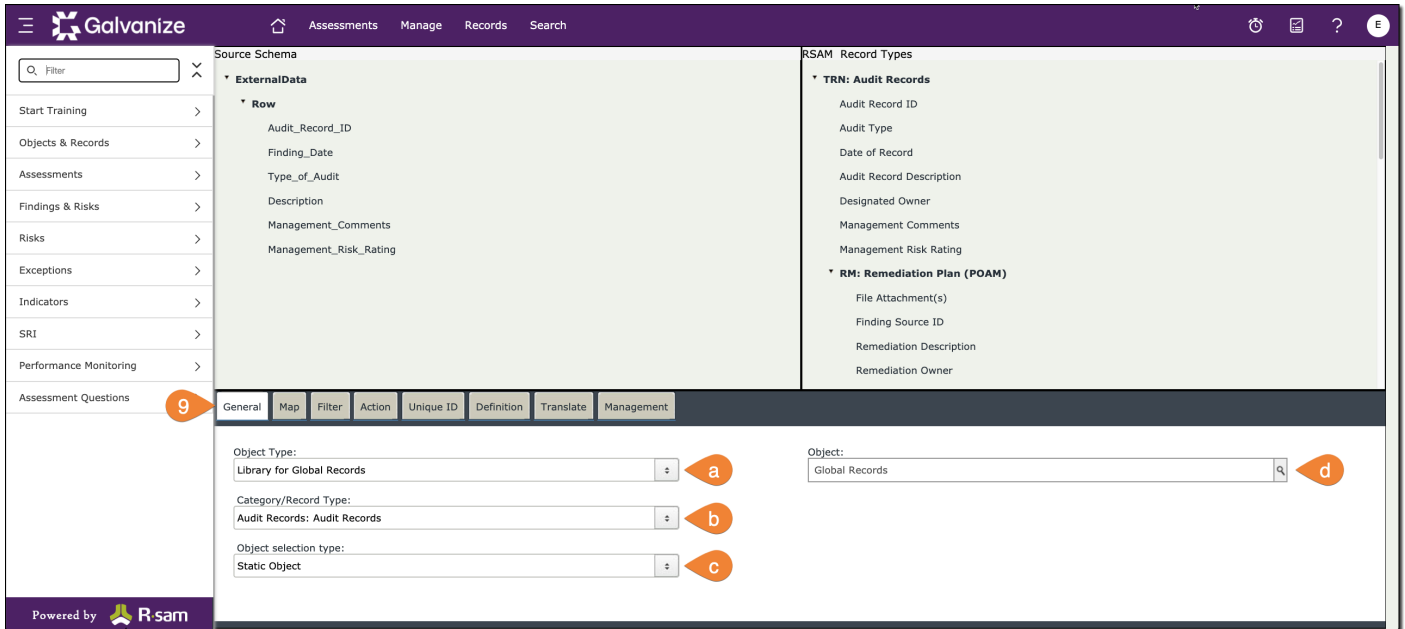
☒ First Row Has Column Names

Grouping:

Import Now Customize New Map **8**

Powered by R sam

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**



Source Schema

- ExternalData
 - Row
 - Audit_Record_ID
 - Finding_Date
 - Type_of_Audit
 - Description
 - Management_Comments
 - Management_Risk_Rating

RSAM Record Types

- TRN: Audit Records
 - Audit Record ID
 - Audit Type
 - Date of Record
 - Audit Record Description
 - Designated Owner
 - Management Comments
 - Management Risk Rating
- RM: Remediation Plan (POAM)
 - File Attachment(s)
 - Finding Source ID
 - Remediation Description
 - Remediation Owner

General | Map | Filter | Action | Unique ID | Definition | Translate | Management

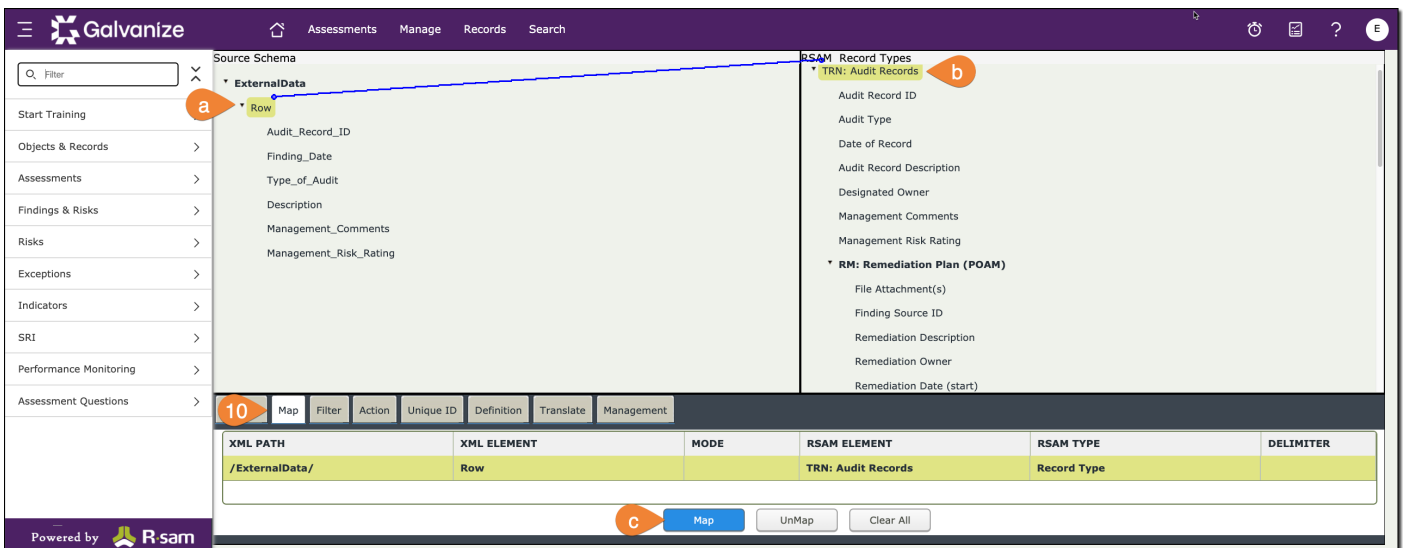
Object Type: Library for Global Records

Category/Record Type: Audit Records: Audit Records

Object selection type: Static Object

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**



Source Schema

- ExternalData
 - Row
 - Audit_Record_ID
 - Finding_Date
 - Type_of_Audit
 - Description
 - Management_Comments
 - Management_Risk_Rating

RSAM Record Types

- TRN: Audit Records
 - Audit Record ID
 - Audit Type
 - Date of Record
 - Audit Record Description
 - Designated Owner
 - Management Comments
 - Management Risk Rating
- RM: Remediation Plan (POAM)
 - File Attachment(s)
 - Finding Source ID
 - Remediation Description
 - Remediation Owner
 - Remediation Date (start)

Map | Filter | Action | Unique ID | Definition | Translate | Management

XML PATH	XML ELEMENT	MODE	RSAM ELEMENT	RSAM TYPE	DELIMITER
/ExternalData/	Row		TRN: Audit Records	Record Type	

Map | UnMap | Clear All

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

General

Map

Filter

Action

Unique ID

Definition

Translate

Management

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	

Map

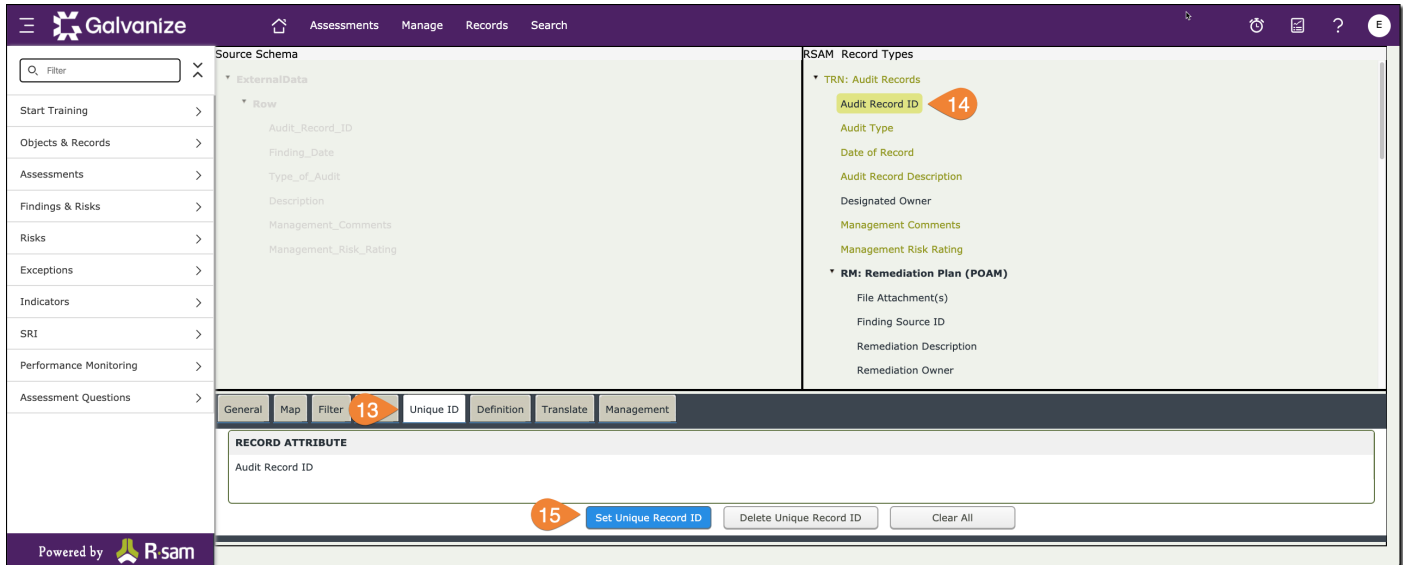
UnMap

Clear All

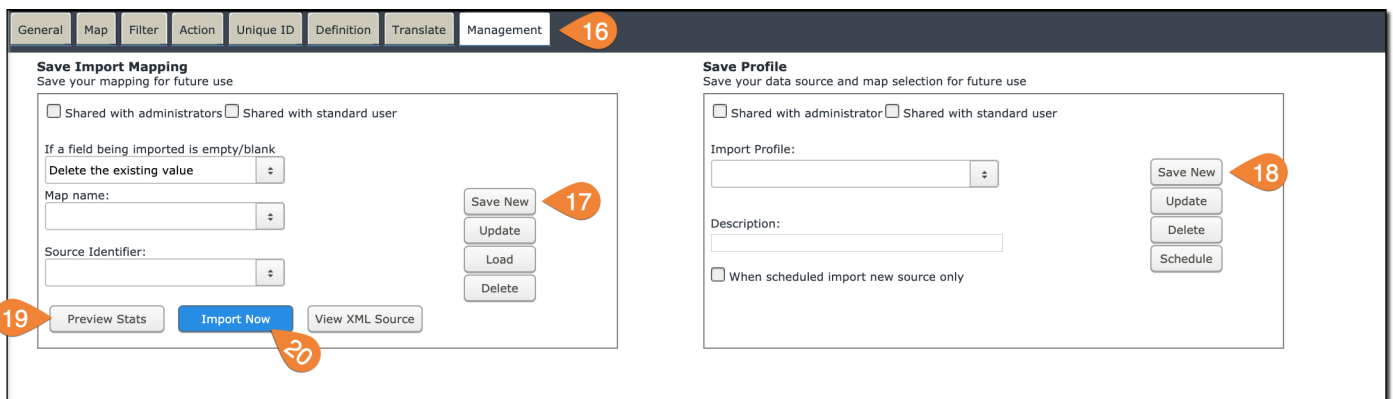
Change Mode

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