



Basic Administrator Training

Exercise: 7
Configuring Searches, Charts &
Home Pages

Version Information

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

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Overview

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

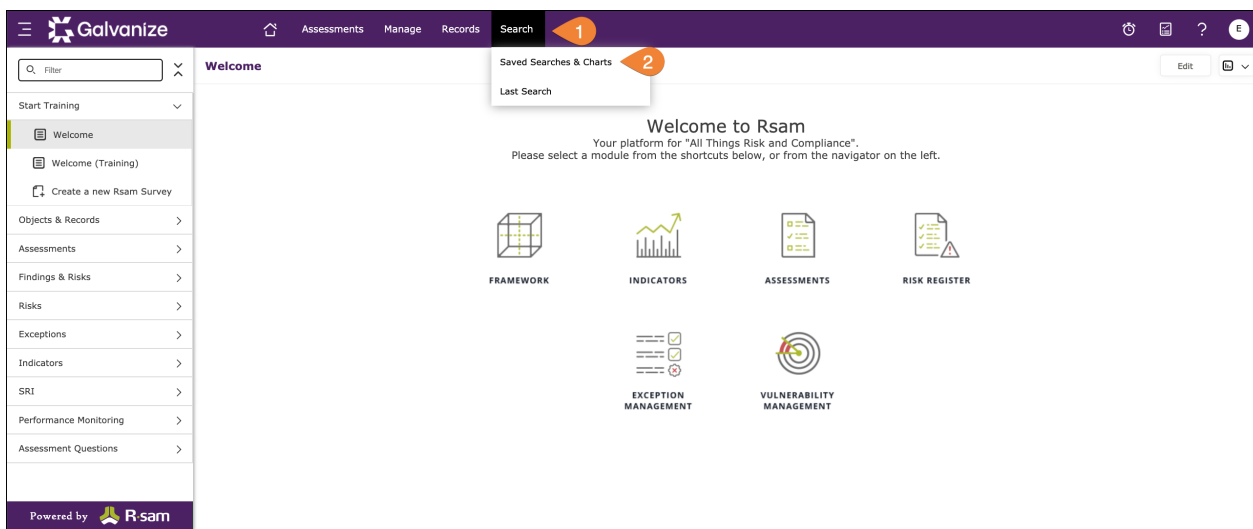
Creating a Search



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

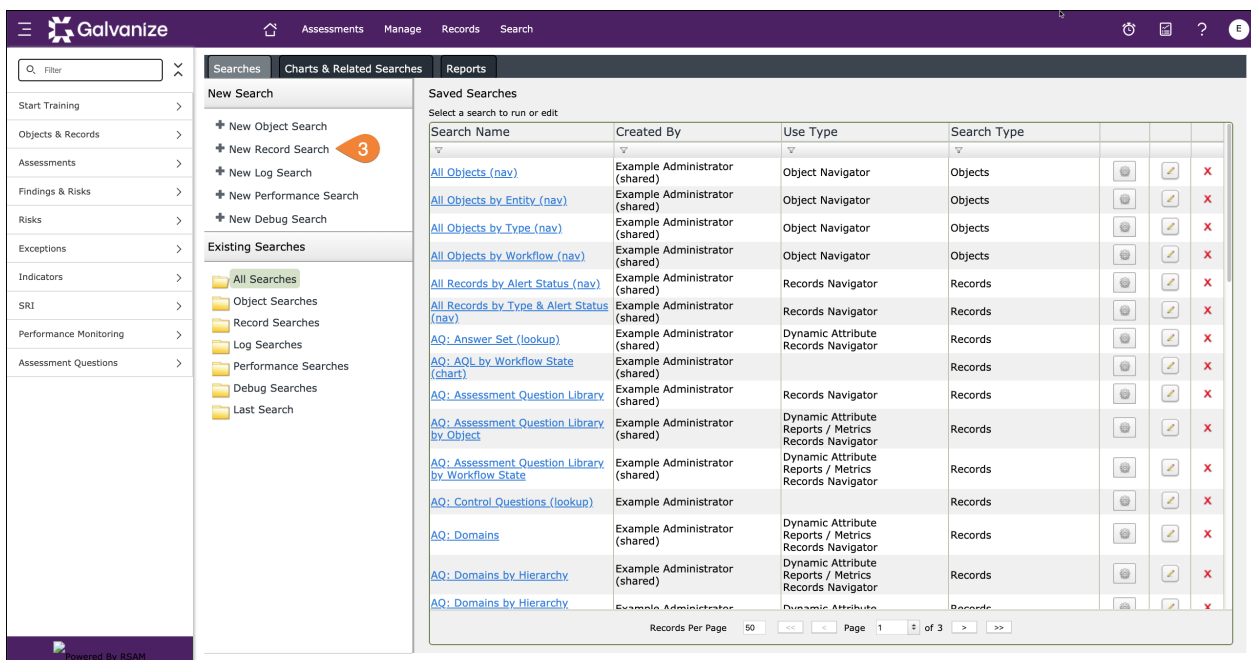
Steps to Follow:

1. Select **Search**
2. Select **Saved Searches & Charts**



The screenshot shows the Galvanize dashboard. The top navigation bar includes 'Assessments', 'Manage', 'Records', and 'Search'. The 'Search' menu is open, showing 'Saved Searches & Charts' and 'Last Search'. The main content area displays a 'Welcome to Rsam' message and several shortcuts: Framework, Indicators, Assessments, Risk Register, Exception Management, and Vulnerability Management.

3. Select **New Record Search**



The screenshot shows the 'New Search' dialog box. The 'New Search' tab is active, and the 'New Record Search' option is selected. The 'Saved Searches' table is displayed, showing a list of searches with columns for Search Name, Created By, Use Type, and Search Type. The table includes various searches such as 'All Objects (nav)', 'All Objects by Entity (nav)', 'All Objects by Type (nav)', 'All Objects by Workflow (nav)', 'All Records by Alert Status (nav)', 'All Records by Type & Alert Status (nav)', 'AQ: Answer Set (lookup)', 'AQ: AQL by Workflow State (chart)', 'AQ: Assessment Question Library', 'AQ: Assessment Question Library by Object', 'AQ: Assessment Question Library by Workflow State', 'AQ: Control Questions (lookup)', 'AQ: Domains', 'AQ: Domains by Hierarchy', and 'AQ: Domains by Hierarchy'.

Search Name	Created By	Use Type	Search Type
All Objects (nav)	Example Administrator (shared)	Object Navigator	Objects
All Objects by Entity (nav)	Example Administrator (shared)	Object Navigator	Objects
All Objects by Type (nav)	Example Administrator (shared)	Object Navigator	Objects
All Objects by Workflow (nav)	Example Administrator (shared)	Object Navigator	Objects
All Records by Alert Status (nav)	Example Administrator (shared)	Records Navigator	Records
All Records by Type & Alert Status (nav)	Example Administrator (shared)	Records Navigator	Records
AQ: Answer Set (lookup)	Example Administrator (shared)	Dynamic Attribute Reports / Metrics Records Navigator	Records
AQ: AQL by Workflow State (chart)	Example Administrator (shared)	Records	Records
AQ: Assessment Question Library	Example Administrator (shared)	Records Navigator	Records
AQ: Assessment Question Library by Object	Example Administrator (shared)	Dynamic Attribute Reports / Metrics Records Navigator	Records
AQ: Assessment Question Library by Workflow State	Example Administrator (shared)	Dynamic Attribute Reports / Metrics Records Navigator	Records
AQ: Control Questions (lookup)	Example Administrator	Records	Records
AQ: Domains	Example Administrator (shared)	Dynamic Attribute Reports / Metrics Records Navigator	Records
AQ: Domains by Hierarchy	Example Administrator (shared)	Dynamic Attribute Reports / Metrics Records Navigator	Records
AQ: Domains by Hierarchy	Example Administrator	Dynamic Attribute	Records

- Click the drop-down arrows next to **Quick Search**
- 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

Field Name	Display Order	Field Filter
Audit Records		
Assessment Library Question	Record Category	1
Questionnaire Finding	Record Type	2
Response to Review	Record Workflow State	3
Assessment Procedure	Object Name	4
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		


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

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	

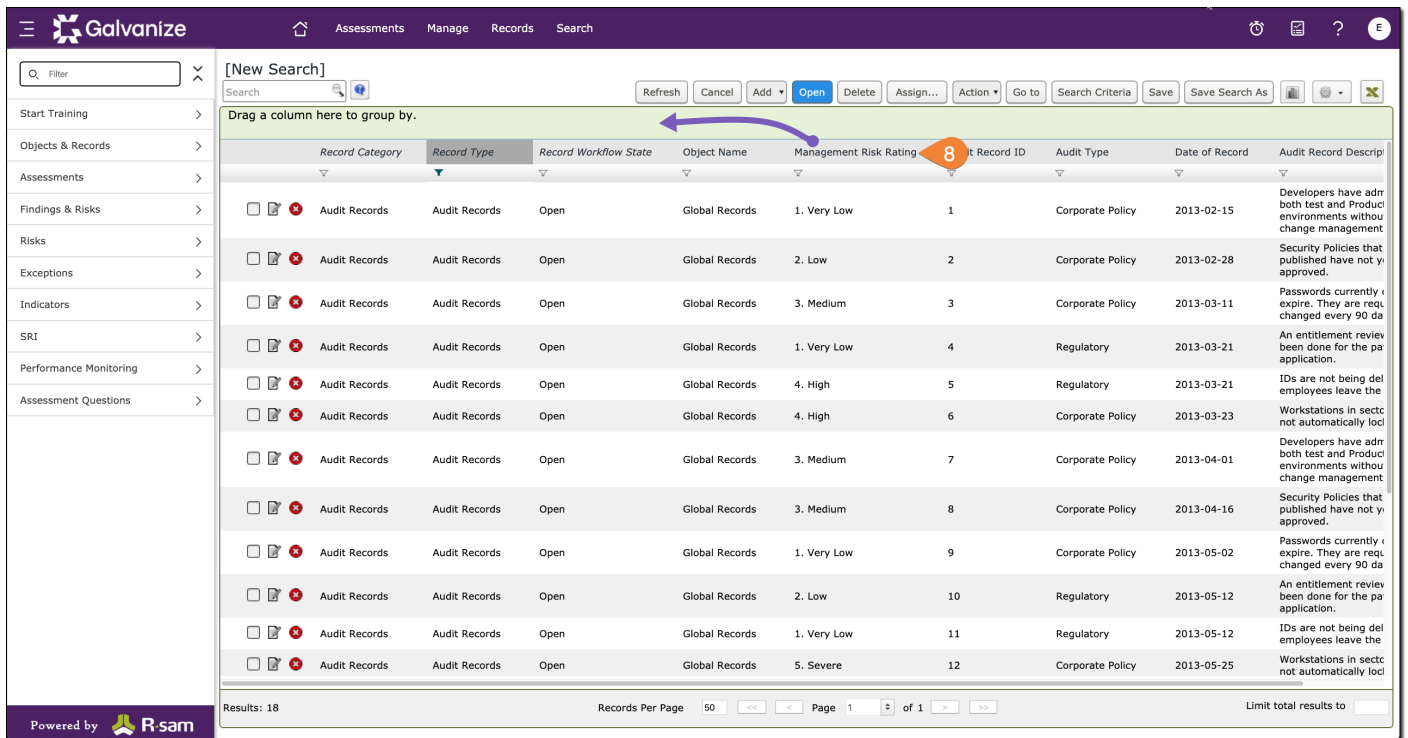
Attribute Types: ☐ Sort alphabetically ☒ Limit to selected Object Types/Record Types and ancestors

7

Update

Cancel

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



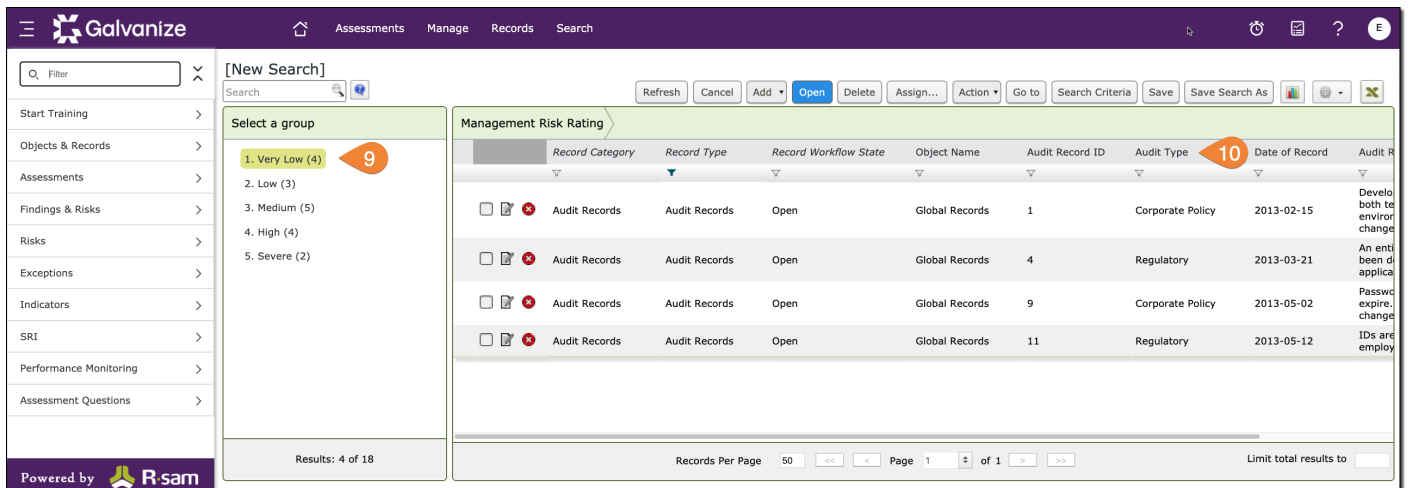
The screenshot shows the Galvanize interface with a search results table. The table has columns: Record Category, Record Type, Record Workflow State, Object Name, Management Risk Rating, Audit Record ID, Audit Type, Date of Record, and Audit Record Description. The 'Management Risk Rating' column is highlighted with a red circle and a red arrow pointing to the green pivot area above the table.

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 adr 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 i expire. They are req 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 adr 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 i expire. They are req 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

Results: 18 Records Per Page 50 Page 1 of 1 Limit total results to

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

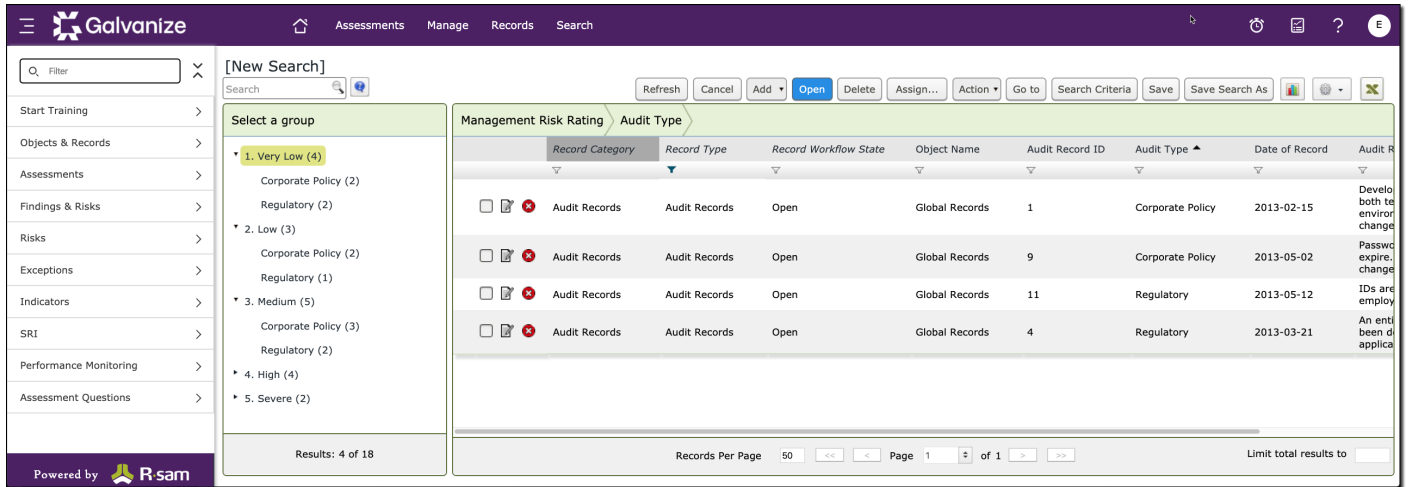


The screenshot shows the Galvanize interface with a search results table. The table has columns: Record Category, Record Type, Record Workflow State, Object Name, Audit Record ID, Audit Type, Date of Record, and Audit Record Description. The 'Management Risk Rating' column is highlighted with a red circle and a red arrow pointing to the green pivot area. The 'Audit Type' column is also highlighted with a red circle and a red arrow pointing to the green pivot area.

Record Category	Record Type	Record Workflow State	Object Name	Audit Record ID	Audit Type	Date of Record	Audit Record Description
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

Results: 4 of 18 Records Per Page 50 Page 1 of 1 Limit total results to

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



The screenshot shows the Galvanize application interface. On the left is a sidebar with navigation links: Start Training, Objects & Records, Assessments, Findings & Risks, Risks, Exceptions, Indicators, SRI, Performance Monitoring, and Assessment Questions. The main area displays a search results page for "Audit Records". The search criteria are set to "Management Risk Rating" and "Audit Type". The results are sorted by "Management Risk Rating" and then by "Audit Type". The table shows 4 results, all with a "Very Low" risk rating. The table columns are: Record Category, Record Type, Record Workflow State, Object Name, Audit Record ID, Audit Type, Date of Record, and Audit R. The results are as follows:

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 enviro 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

The interface also includes a search bar at the top, a "New Search" button, and a "Results: 4 of 18" indicator. The bottom of the page shows the "Powered by R sam" logo.

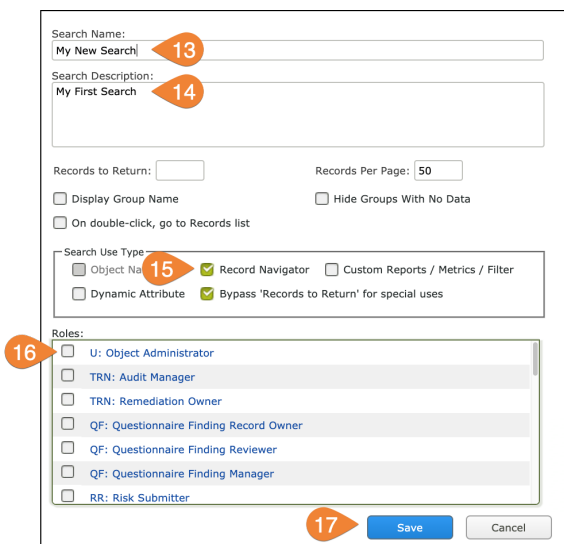
Saving a Search

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

- Click on the **Save Search As** button
- Enter the Search name **My New Search**
- Provide an optional description in the **Search Description** box
- Check the box next to **Record Navigator**
- Click the U: Object Administrator role
 - You will be prompted to **Save**
 - Click **Yes**
 - For the permission select **Edit**
 - Click **Save**
- Click on **Save**



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

- Search Name:** A text input field containing 'My New Search' (callout 13).
- Search Description:** A text input field containing 'My First Search' (callout 14).
- Records to Return:** A text input field.
- Records Per Page:** A text input field containing '50'.
- Display Group Name:** A checkbox.
- Hide Groups With No Data:** A checkbox.
- On double-click, go to Records list:** A checkbox.
- Search Use Type:** A section with two rows of checkboxes:
 - Object Name (callout 15), Record Navigator (checked), Custom Reports / Metrics / Filter
 - Dynamic Attribute, Bypass 'Records to Return' for special uses (checked)
- 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:** 'Save' (callout 17) and 'Cancel'.

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.

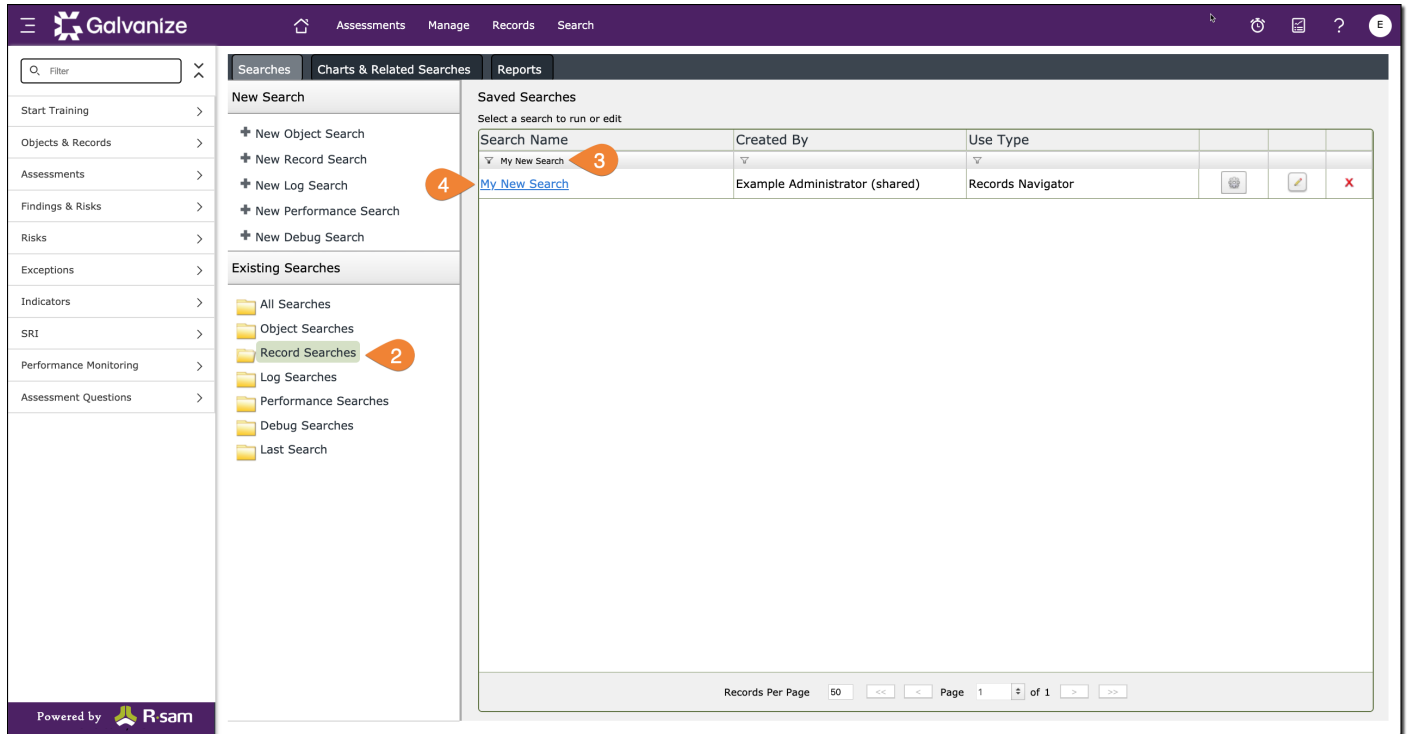
Creating and Saving a Chart

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.

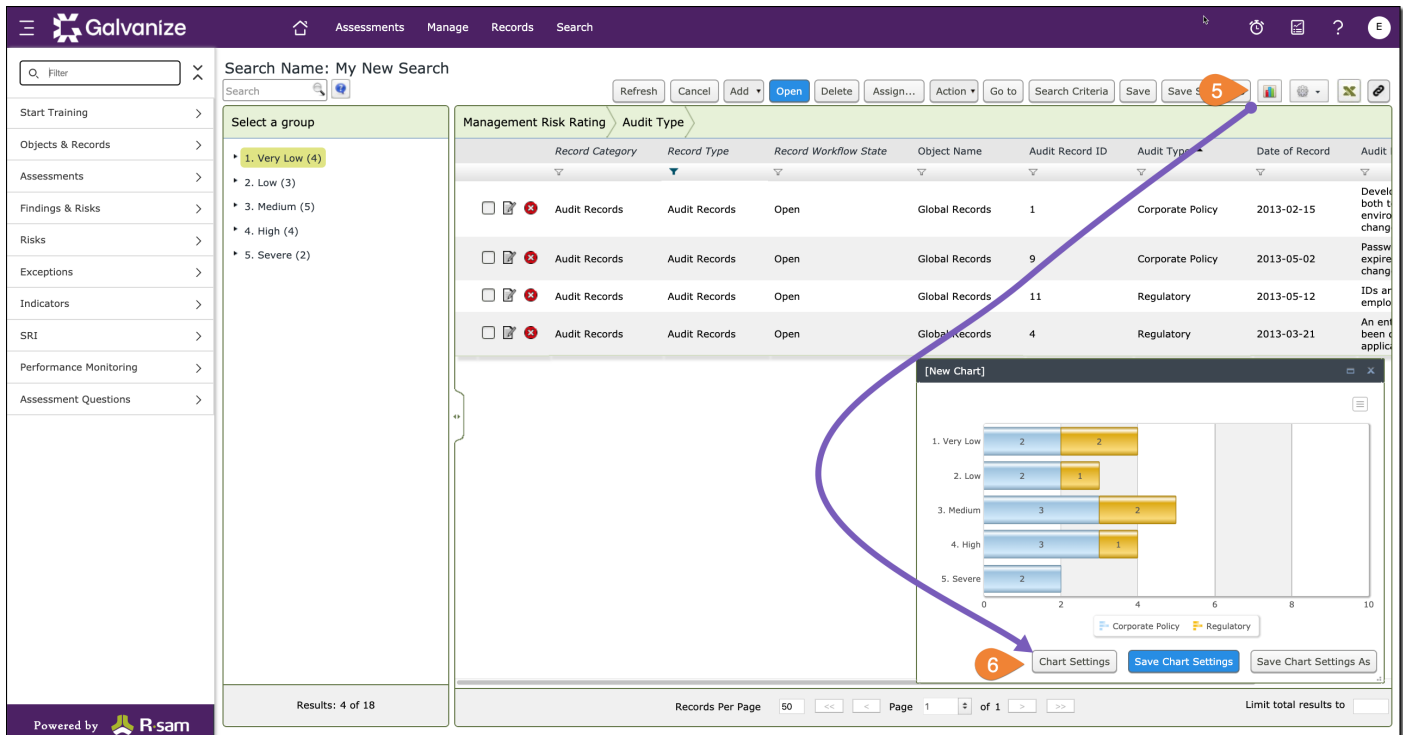
Steps to Follow:

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.



The screenshot shows the Galvanize application interface. On the left is a sidebar with a search filter and a list of categories like 'Start Training', 'Objects & Records', 'Assessments', etc. The main area has tabs for 'Searches', 'Charts & Related Searches', and 'Reports'. The 'Searches' tab is active, showing a 'New Search' section with options like 'New Object Search', 'New Record Search', 'New Log Search', 'New Performance Search', and 'New Debug Search'. Below this is an 'Existing Searches' section with a list of search categories: 'All Searches', 'Object Searches', 'Record Searches' (highlighted with a red circle and the number 2), 'Log Searches', 'Performance Searches', 'Debug Searches', and 'Last Search'. The 'Record Searches' category is selected, displaying a table of 'Saved Searches'. The table has columns for 'Search Name', 'Created By', and 'Use Type'. A new search entry 'My New Search' is added to the table, highlighted with a red circle and the number 3. The 'Created By' column shows 'Example Administrator (shared)' and the 'Use Type' column shows 'Records Navigator'. A red circle with the number 4 points to the 'My New Search' entry. At the bottom of the table, there is a pagination bar showing 'Records Per Page' set to 50, 'Page 1 of 1', and navigation buttons.

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



The screenshot shows the Galvanize interface with a search results table and a 'New Chart' window. The search results table has columns: Record Category, Record Type, Record Workflow State, Object Name, Audit Record ID, Audit Type, Date of Record, and Audit. The 'New Chart' window shows a horizontal bar chart with categories: 1. Very Low (4), 2. Low (3), 3. Medium (5), 4. High (4), and 5. Severe (2). The chart shows two series: Corporate Policy (blue) and Regulatory (yellow). The 'Chart Settings' button is highlighted with a purple arrow and a red circle with the number 6.

7. 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

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

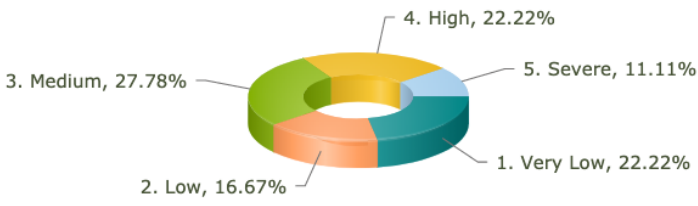


Clicking Apply after you make a change will automatically update the chart and show you what that value / option looks like.

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

[New Chart]

My First Chart
My Sub Title



Risks by Severity

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

9

Chart Settings Save Chart Settings Save Chart Settings As

New Chart

Please enter new chart name

10

My New Chart

11

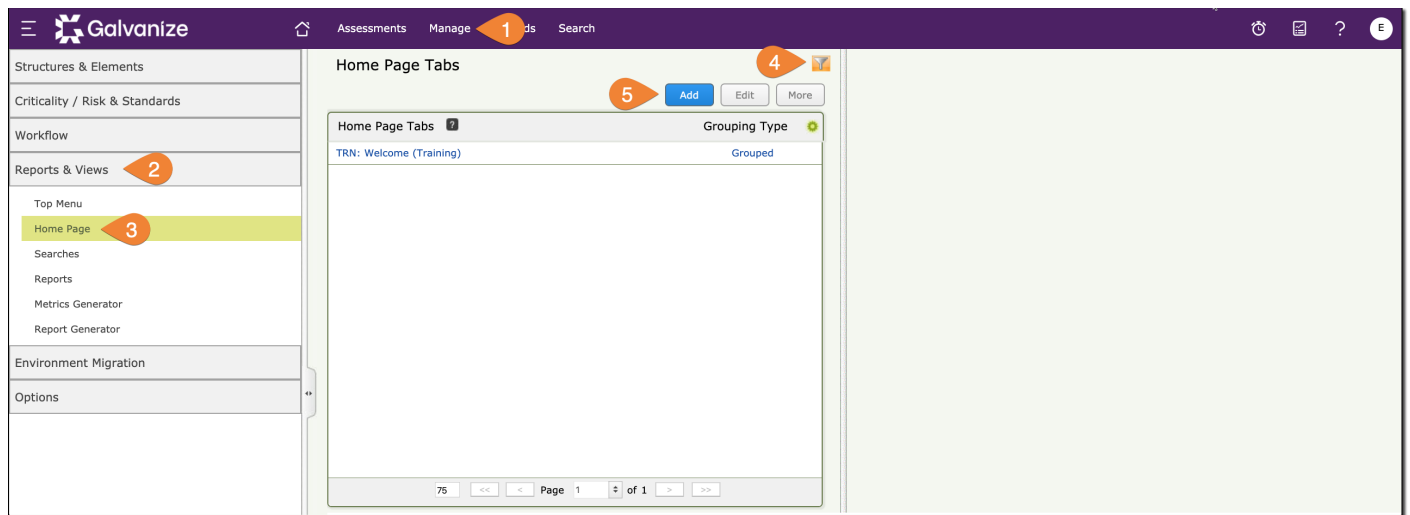
OK Cancel

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

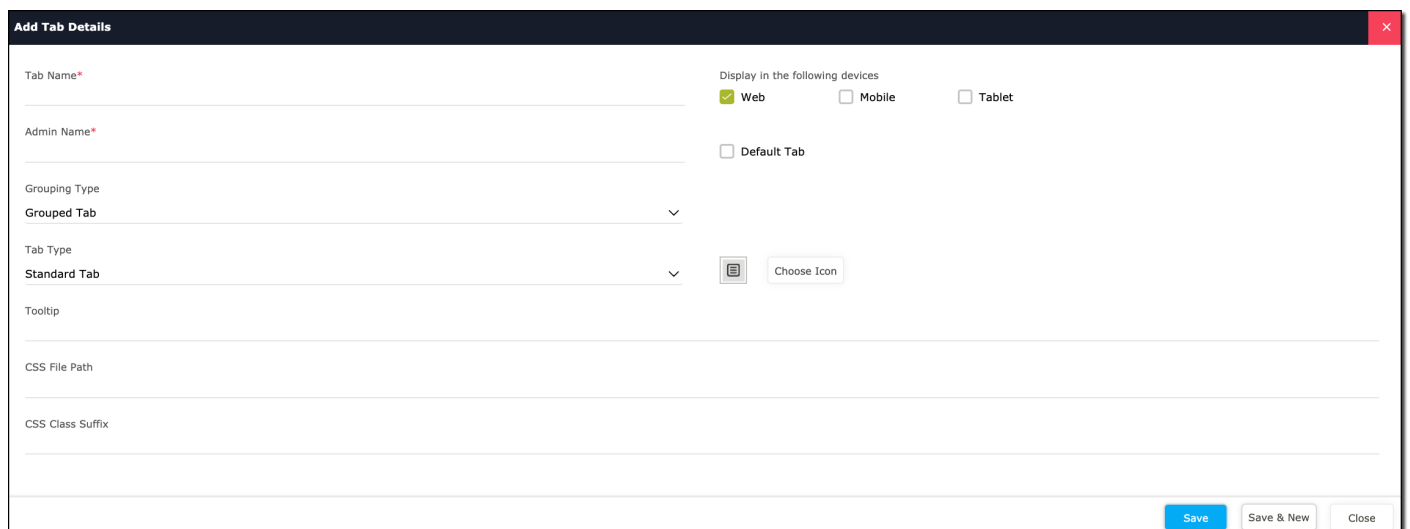
Once you have created and saved a related search and chart, you can place the chart on a home-page tab. In this example, we will create a new grouping home page and two new grouped tabs. To perform this step by using the Web Administration screen.

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"/> Default Tab	Check this option (This will assign the Home Page to all Roles) Rsam will ask you to confirm this action. Select "Yes"
Self Registration Links (Add New)	Add TRN: Audit Records: TRN: Audit Records (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"/> Default Tab	Check this option (This assigns this Home Page to all Roles) Rsam will ask you to confirm this action. Select "Yes"

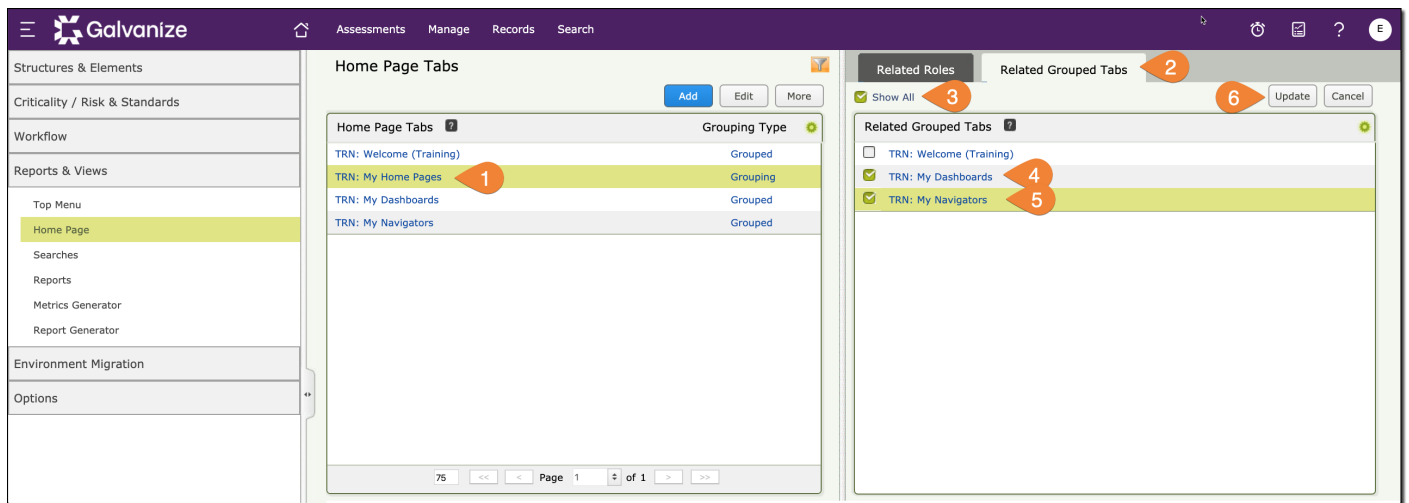
10. Click Save & New
11. Use the table below and follow the same process to enter a **Navigator** tab

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 My Audit Search and Your other named Search , then click Update
Tool Tip	My Navigators
CSS File Path	
CSS Class Suffix	
<input checked="" type="checkbox"/> Default Tab	Check this option (This assigns this Home Page to all Roles) Rsam will ask you to confirm this action. Select “Yes”

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 'Home Page Tabs' configuration page. The left sidebar lists various sections, with 'Home Page' selected. The main content area is divided into two panels. The left panel, titled 'Home Page Tabs', shows a table with the following data:

Home Page Tabs	Grouping Type
TRN: Welcome (Training)	Grouped
TRN: My Home Pages	Grouping
TRN: My Dashboards	Grouped
TRN: My Navigators	Grouped

The right panel, titled 'Related Grouped Tabs', shows a table with the following data:

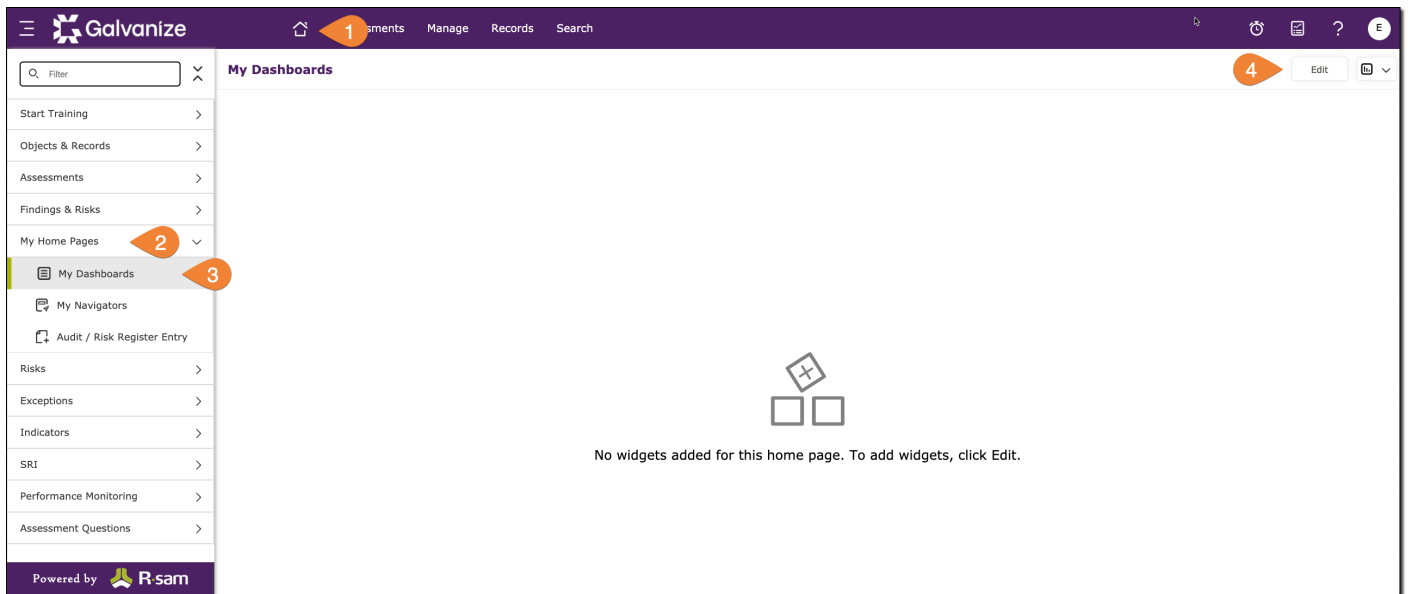
Related Grouped Tabs
<input type="checkbox"/> TRN: Welcome (Training)
<input checked="" type="checkbox"/> TRN: My Dashboards
<input checked="" type="checkbox"/> TRN: My Navigators

Numbered callouts (1-6) indicate the steps for configuration: 1 points to 'TRN: My Home Pages' in the Home Page Tabs table; 2 points to the 'Related Grouped Tabs' tab; 3 points to the 'Show All' checkbox; 4 points to the 'TRN: My Dashboards' checkbox; 5 points to the 'TRN: My Navigators' checkbox; and 6 points to the 'Update' button.

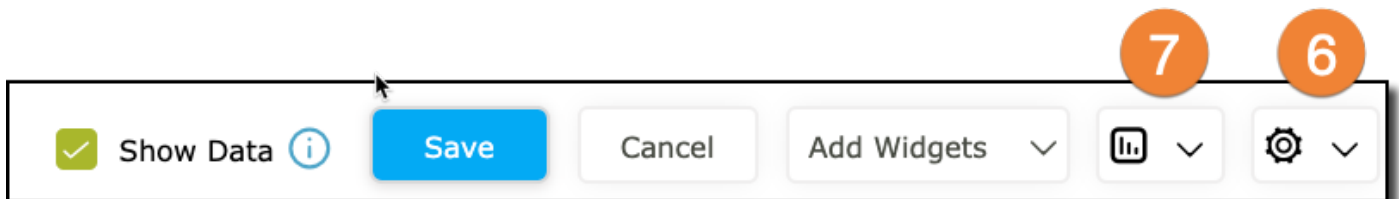
Configuring Home Pages

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.

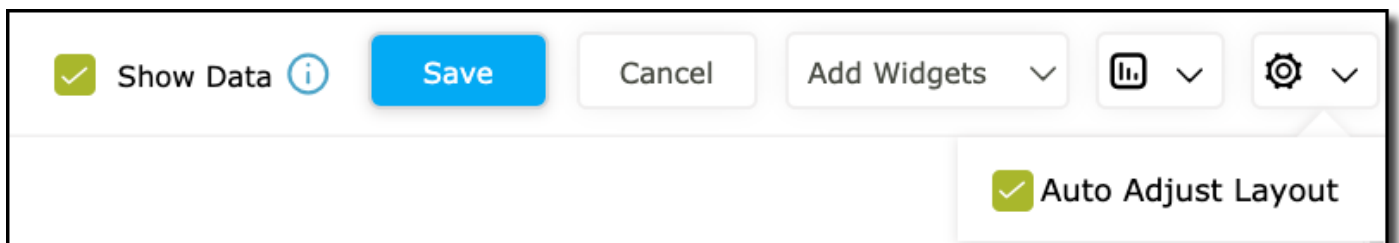
1. Click the **Home** icon
2. Expand My Home Pages
3. Select My Dashboards
4. Click **Edit**



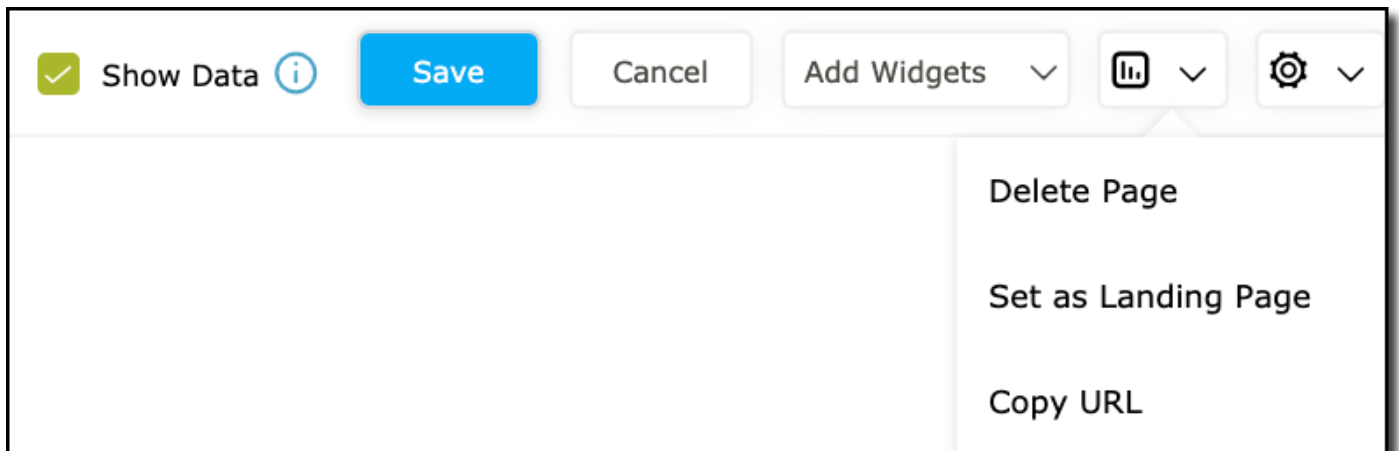
5. The following menu will appear



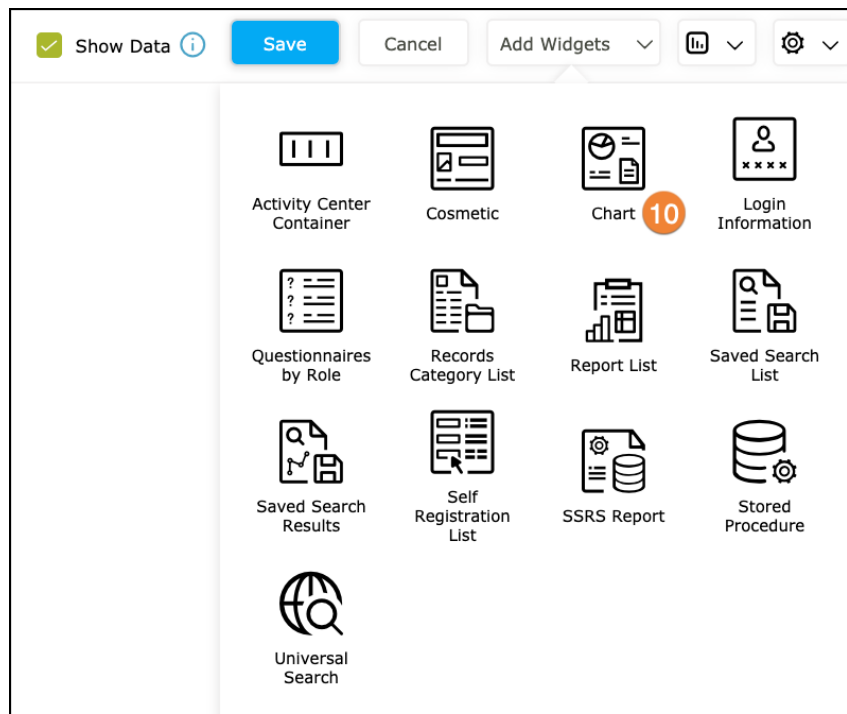
6. This option allows you to set **Auto Adjust** on or off. When switched off you can make very fine adjustment in placement for your widgets. Note that it must be switched on if you plan to add an Activity Center to your Home Page.



7. 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.

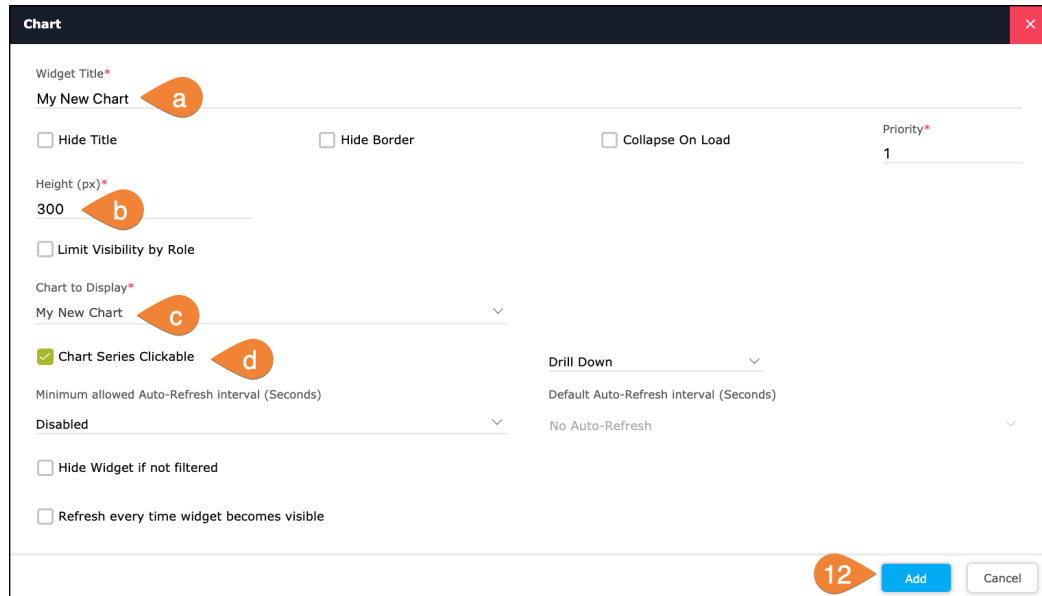


8. Let's add some widgets to the Home Page
9. Click Add Widgets
10. Drag the **Chart** widget to the top of the page



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

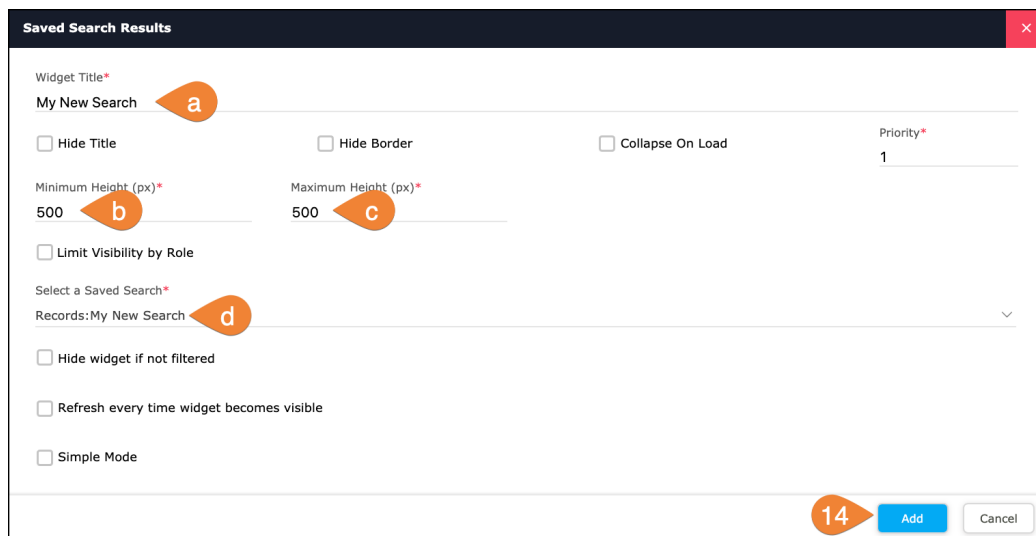
12. Click **Add**



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**

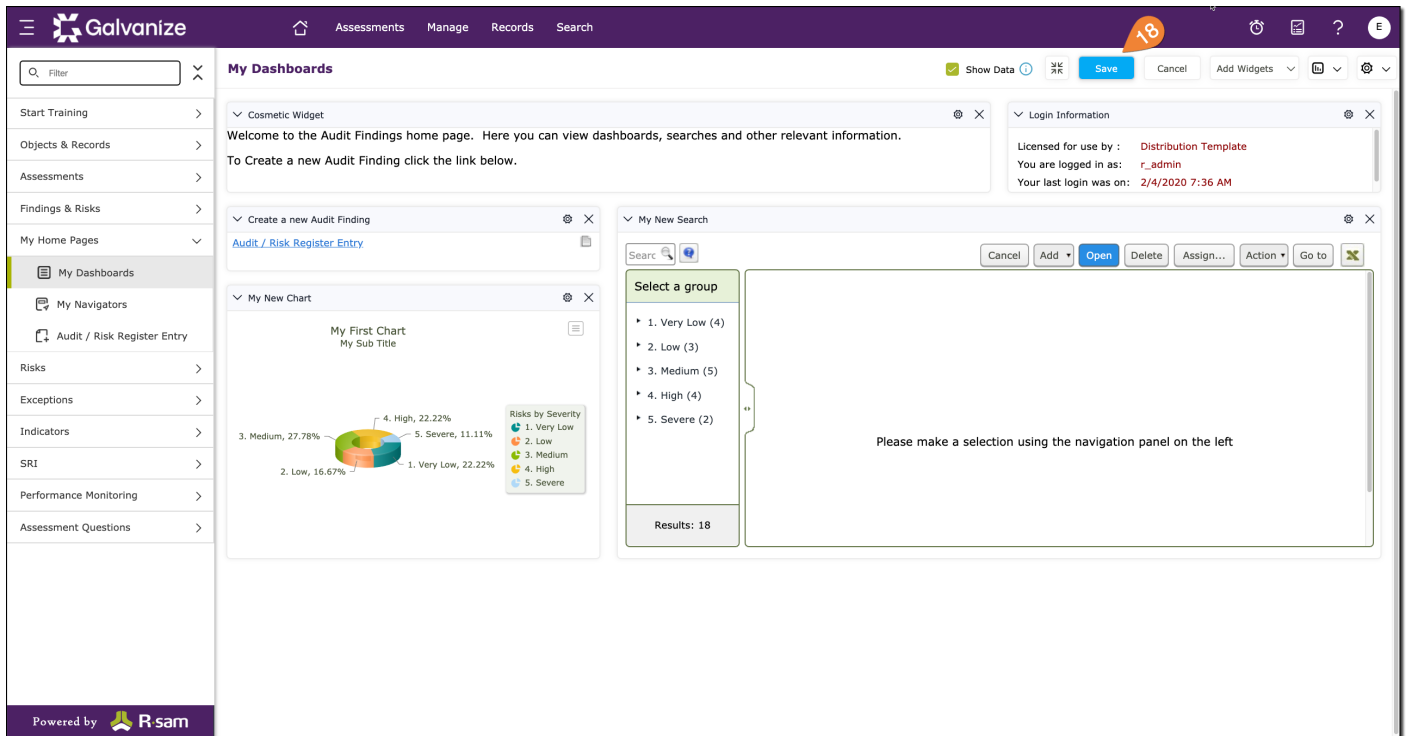


15. Click **Add**

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.

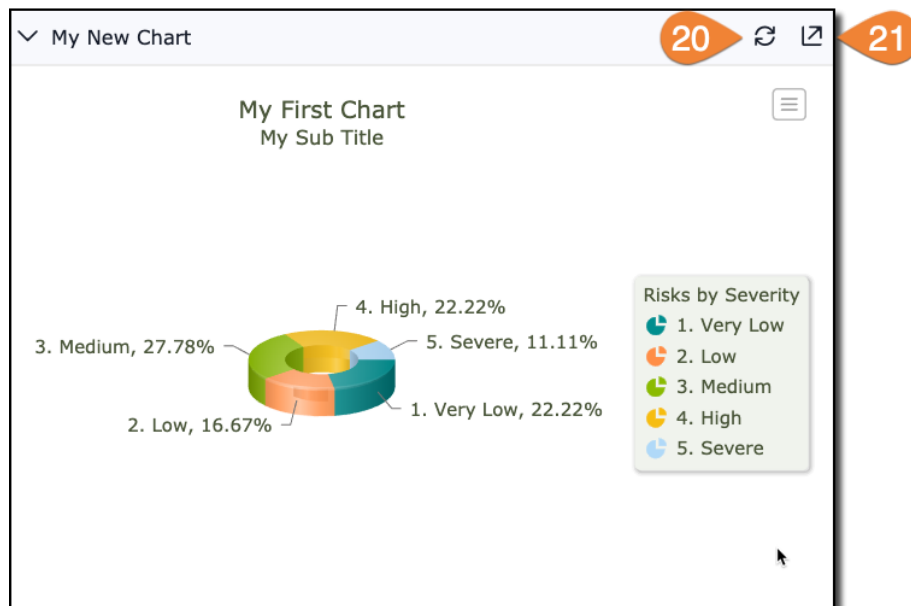
18. Once you are happy with your design click **Save** to lock in your changes.



19. Lets explore some other features.

20. You can refresh the information within the widget

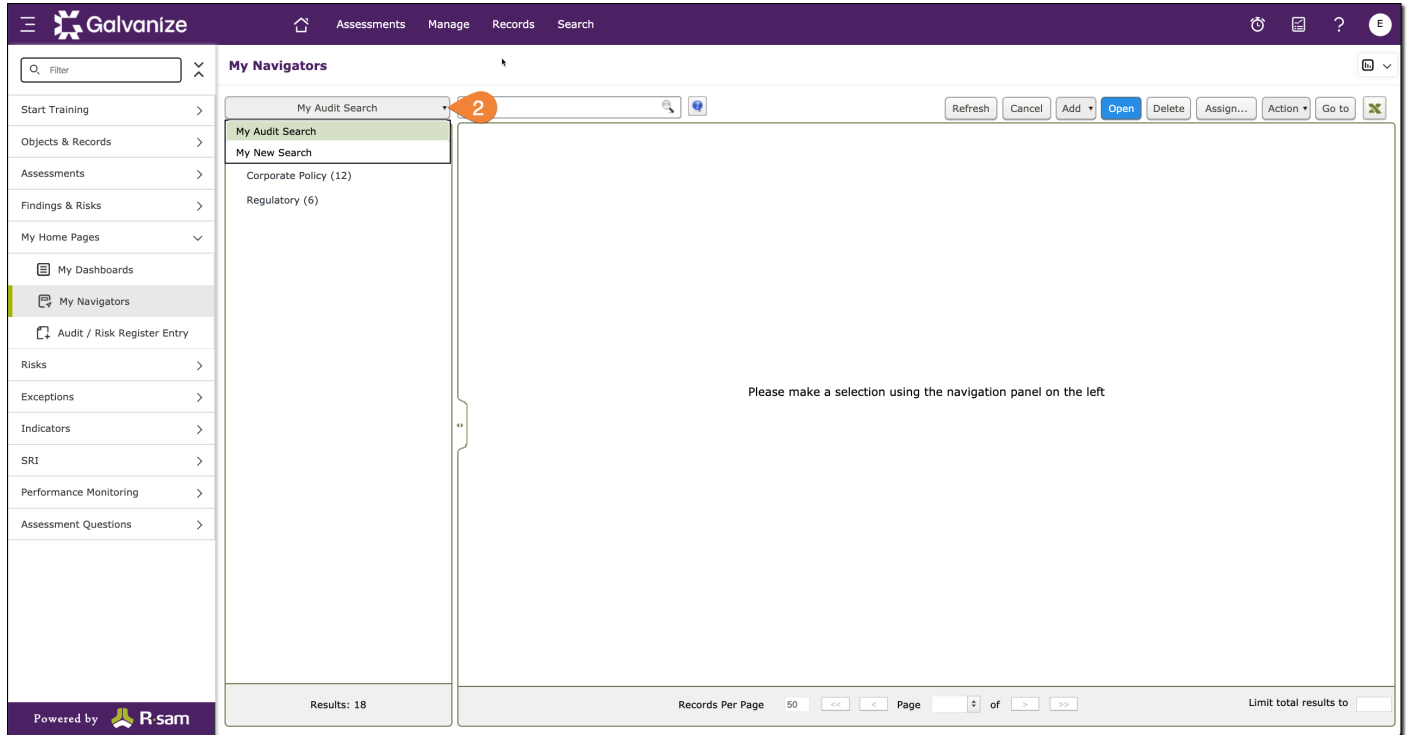
21. You can expand Charts to full screen..



Review your Navigators

Steps to Follow:

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



The screenshot displays the Galvanize application interface. On the left, a navigation sidebar lists various sections, with 'My Navigators' currently selected. The main workspace is titled 'My Navigators' and features a search bar and a list of available navigators. A red callout bubble with the number '2' highlights the dropdown arrow next to 'My Audit Search'. Below the list, a message states 'Please make a selection using the navigation panel on the left'. The bottom of the interface includes a footer with the 'R.sam' logo and a pagination bar showing 'Results: 18' and 'Records Per Page: 50'.

Stop Here

- Take a Break
- Next Session Continues Shortly