



Basic Administrator Training

Exercise: 2  
Administrator Groupings

## Version Information

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Version	Date Released	Notes
2019-1	Jan 7 <sup>th</sup> 2019	Updated Format
2019-2	May 17 <sup>th</sup> 2019	Re-Branded to meet Galvanize design guidelines
2020-1	Jan 6 <sup>th</sup> 2019	Updated Screenshots after Version 10 Update

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## Overall Objectives

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This step-by-step guide details the process of creating an Rsam Administrative Grouping to help better organize and manage similar types of administrative elements in Rsam. During the process, we will create administrative groupings; use the filter in the administrative screens to control which configuration elements are displayed; assign administrative privileges; and use the Administrative Groupings to "Pre-select" configuration elements that will be exported in environment migration.

### Prerequisites

This Administrative Groupings guide requires a basic understanding of the data and configurations utilized in Rsam Questionnaires, Record Types and Workflow. While you may complete the tutorial, you will need a foundation of Rsam knowledge in order for the concepts and relationships referred to in the explanations and exercises to be fully understood. It is assumed that certain structures, elements and workflow components are in place in your Rsam instance or, that you already have the knowledge and skills to add the needed configurations. Although these items are referenced, this guide does not go into detail on how to create them. If your templates in Rsam look different than those described here, simply select your own desired elements.

### Scenario Descriptions

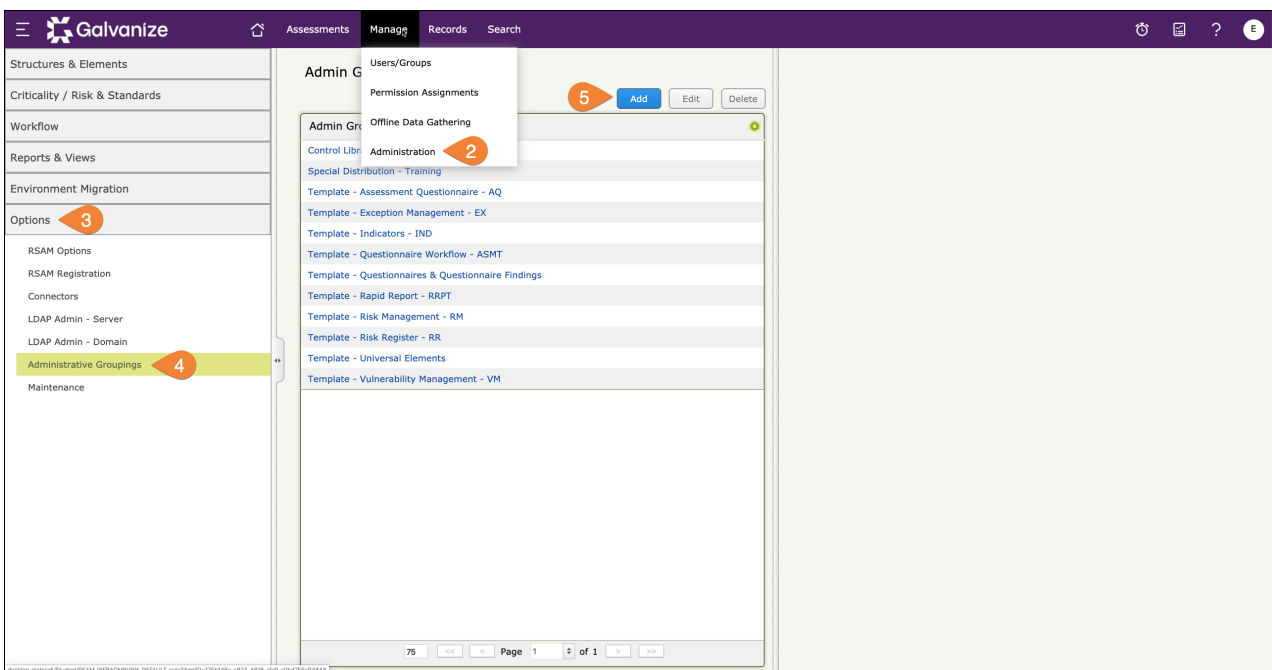
Through this process we will:

- Create an Application Assessment Administrative Grouping
- Use the Administrative Grouping Filter to display only elements related to this group

## Session 1: Create a Administrative Group

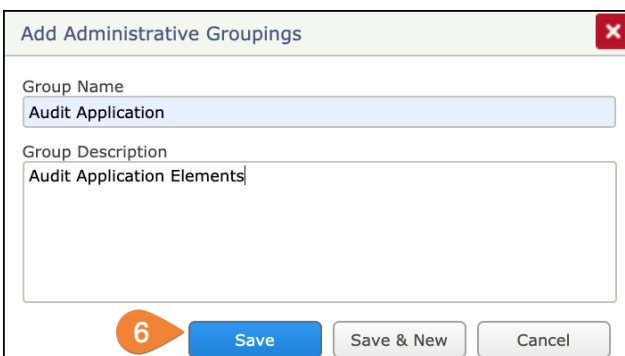
### Steps to Follow

1. Login as a Rsam Administrator (**r\_admin** for the training labs)
2. Navigate to Manage -> Administration
3. Expand **Options**
4. Select Administrative Groupings
5. Select **Add** and enter a Group Name and a Group Description



Fields	Values
Group Name	Audit Application
Group Description	Audit Application Elements

6. Select **Save**



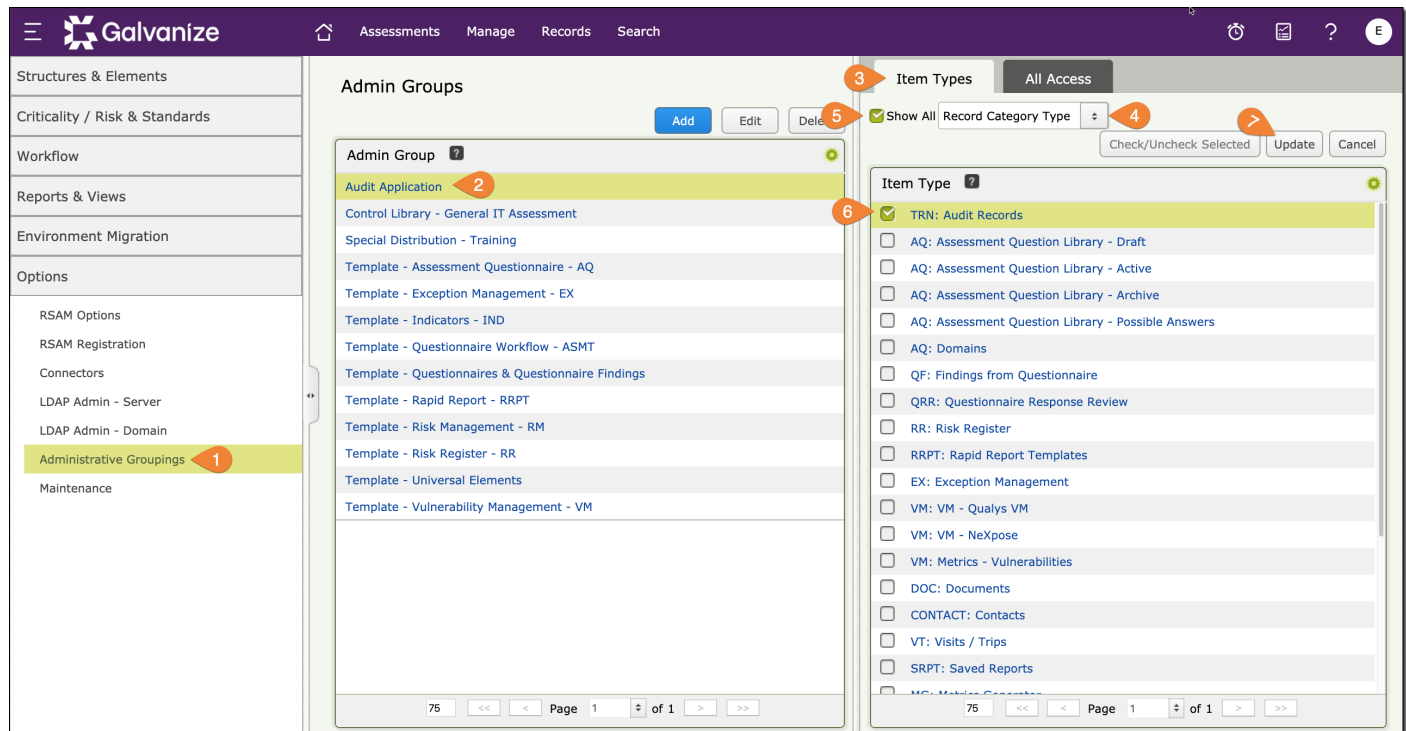
## Session 2: Select Related Configuration Items

The administrative grouping can be associated with most Rsam configuration items. When you select an administrative grouping in the center Admin Groups Tab, the Item Types Tab displays on the right with a List Box containing the possible Rsam configuration elements.

For this exercise we are going to add our newly created Record Category and Record Type.

Steps to Follow:

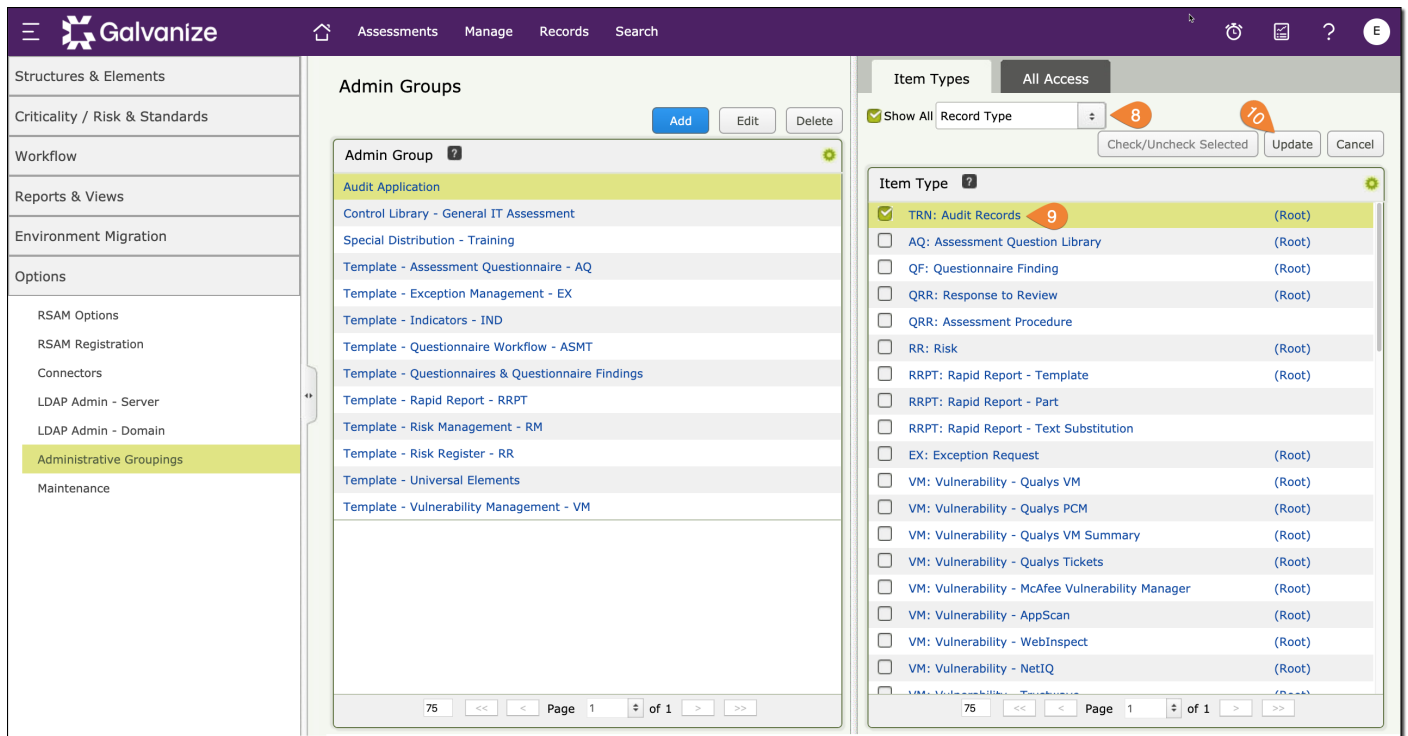
1. Select **Administration Groupings** in the **Options Menu**
2. Select the **Audit Application** admin group in the middle window pane.
3. Select **Item Types** on the right window pane
4. Select **"Record Category Type"** from the drop-down selections
5. Check **Show All**
6. Check the **TRN: Audit Records** category type
7. Click **Update**



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

- Left Sidebar (Options Menu):** Contains a list of navigation items. **Administrative Groupings** is highlighted with a red circle and the number 1.
- Center Panel (Admin Groups):** Displays a list of administrative groups. **Audit Application** is selected and highlighted with a red circle and the number 2. Above the list are buttons for **Add**, **Edit**, and **Delete**, with a red circle and the number 5 over the **Delete** button.
- Right Panel (Item Types):** Displays a list of item types. **TRN: Audit Records** is selected and highlighted with a red circle and the number 6. Above the list is a dropdown menu set to **Record Category Type**, with a red circle and the number 4 over it. To the left of the dropdown is a checkbox labeled **Show All**, which is checked, with a red circle and the number 3 over it. At the bottom of the right panel are buttons for **Check/Uncheck Selected**, **Update**, and **Cancel**, with a red circle and the number 7 over the **Update** button.

8. Repeat the same process but Select **“Record Type”** within the drop-down options
9. Select **TRN: Audit Records**
10. Click **Update**




The screenshot shows the Galvanize Admin Groups interface. The left sidebar has 'Administrative Groupings' selected. The main panel is titled 'Admin Groups' and shows a list of groups. The right panel is titled 'Item Types' and shows a list of item types. A red circle with the number 8 points to the 'Record Type' dropdown menu. A red circle with the number 9 points to the 'TRN: Audit Records' item type.

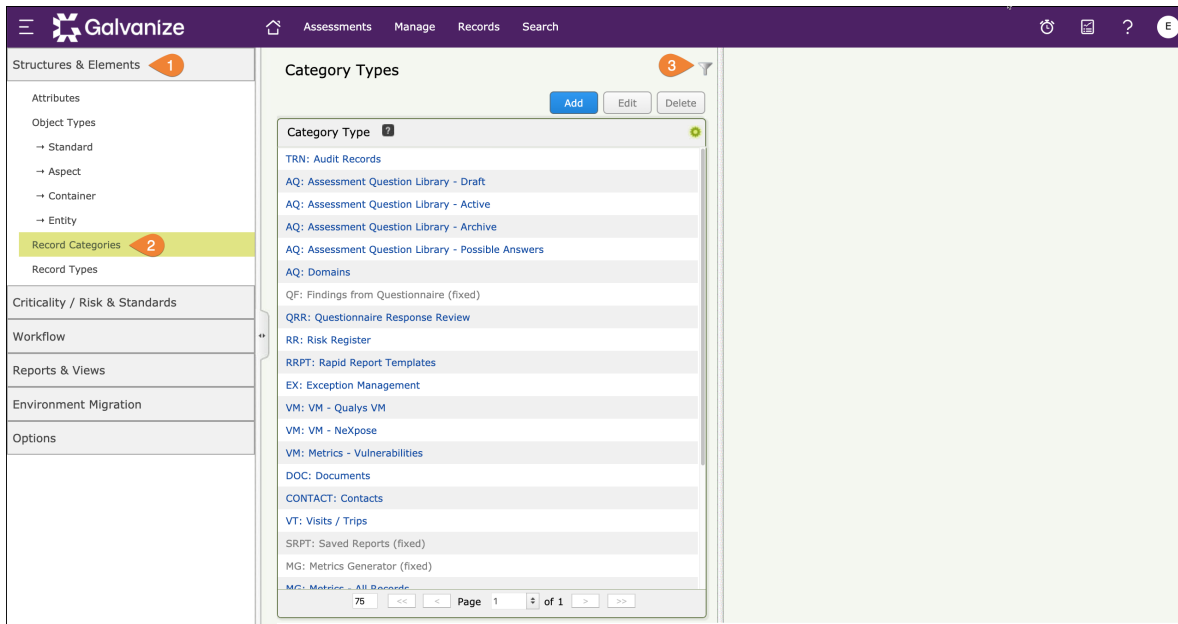
11. Continue this process for the following items.

Drop Down Box Option	Item
Home Page Widgets	TRN: Welcome (Training)
Object Type Standard	Library for Global Records
Workflow Record State	Gen: Finding Open
Record Type	RM: Remediation Plan (POAM)
Record Type	RM: Risk Acceptance Request
Record Type	RM: Compensating Control
Record Type	FE: Follow Up Event
Workflow Roles	U: Object Administrator

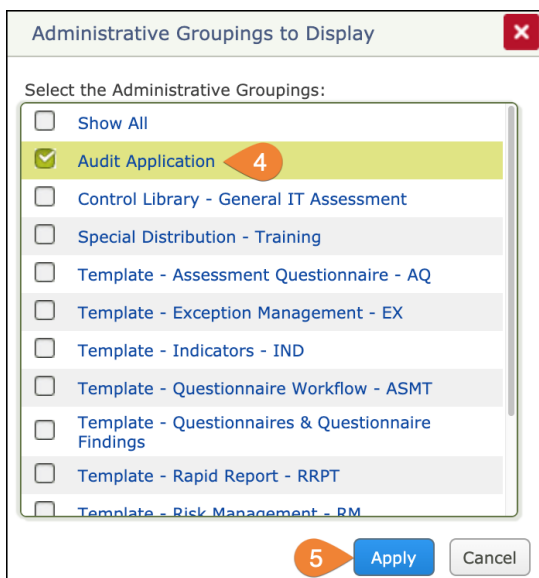
## Session 3: Exploring Administrative Filtering Options

Steps to Follow:

1. Expand Structures & Elements
2. Select Record Categories
3. Click the **Filter Icon** 



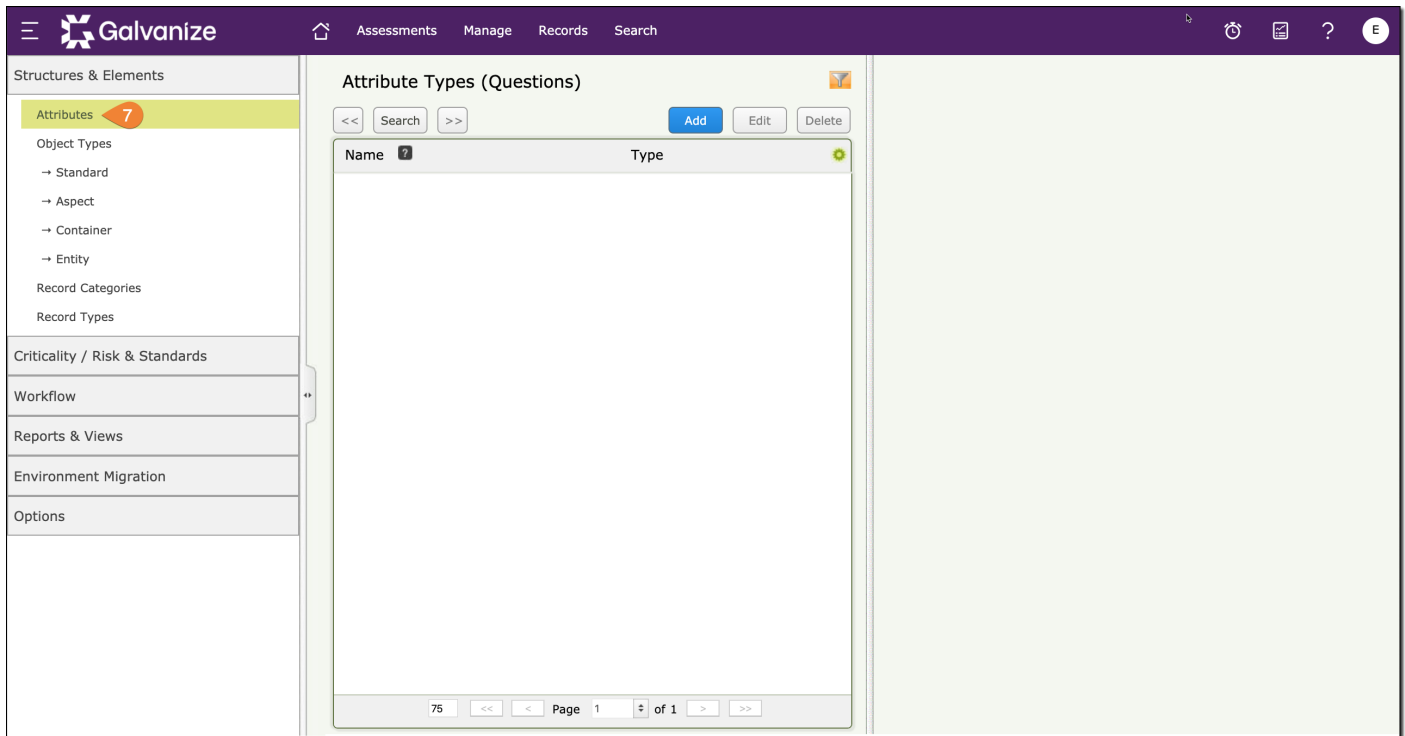
4. Select the new Administrative Grouping item “**Audit Application**”
5. Click **Apply**



6. Note that the list of **Record Categories** is now filtered by your selected administrative grouping(s) and we only see the category recently created **TRN: Audit Records**



7. Now select **Attributes**. The filter remains in place and we see no **Attributes** as we have not added any at this point and the others within the system have been filtered out by the grouping.



#### IMPORTANT INFORMATION:

Leaving the Filter **checked** will cause any additional elements; Attributes, Record Categories, Record Types, Objects and so on to be automatically added to the grouping and filter. Selecting *multiple* groupings will add those elements to all selected groupings.

Using filters can be very useful when you only want to work within one solution and not see elements of other solutions. However, keep this in mind if you think something is missing as the filter maybe hiding related element, if they were not already added to the filter.

Stop Here

- Take a Break
- Next Session Continues Shortly