Basic Administrator Training

Exercise: 7
Configuring Searches, Charts & Home Pages

Version Information

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

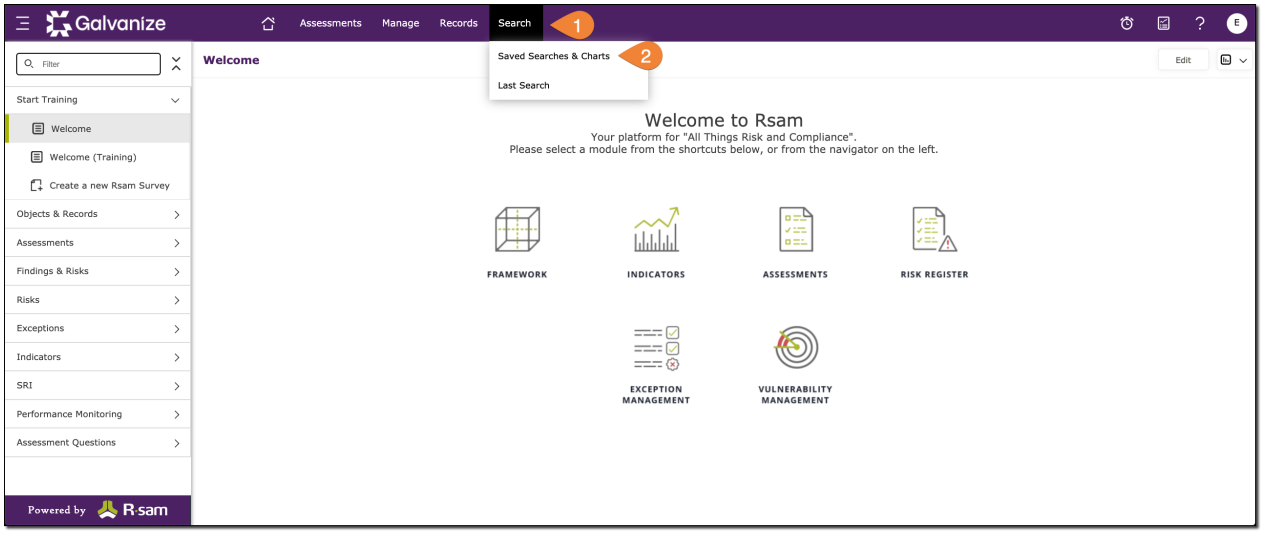
Session 1: Creating and Saving a Search

Creating a Search

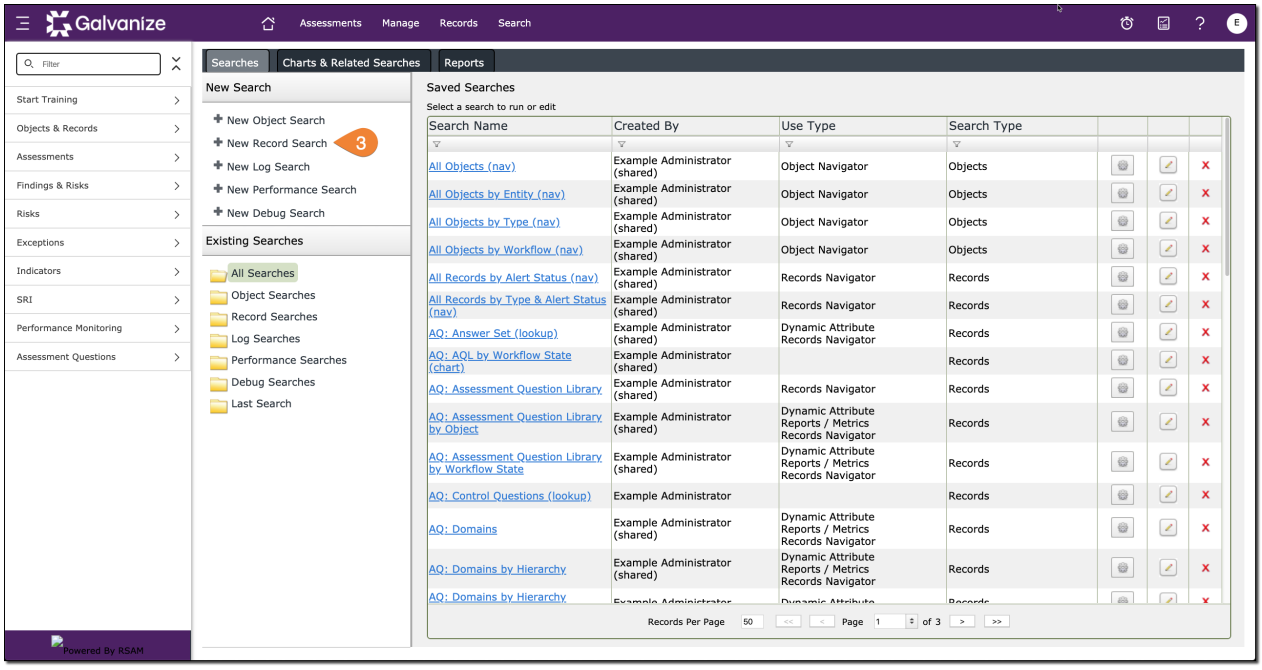
Make sure that pop up blockers are disabled as the search needs to open a new window to

Steps to Follow:

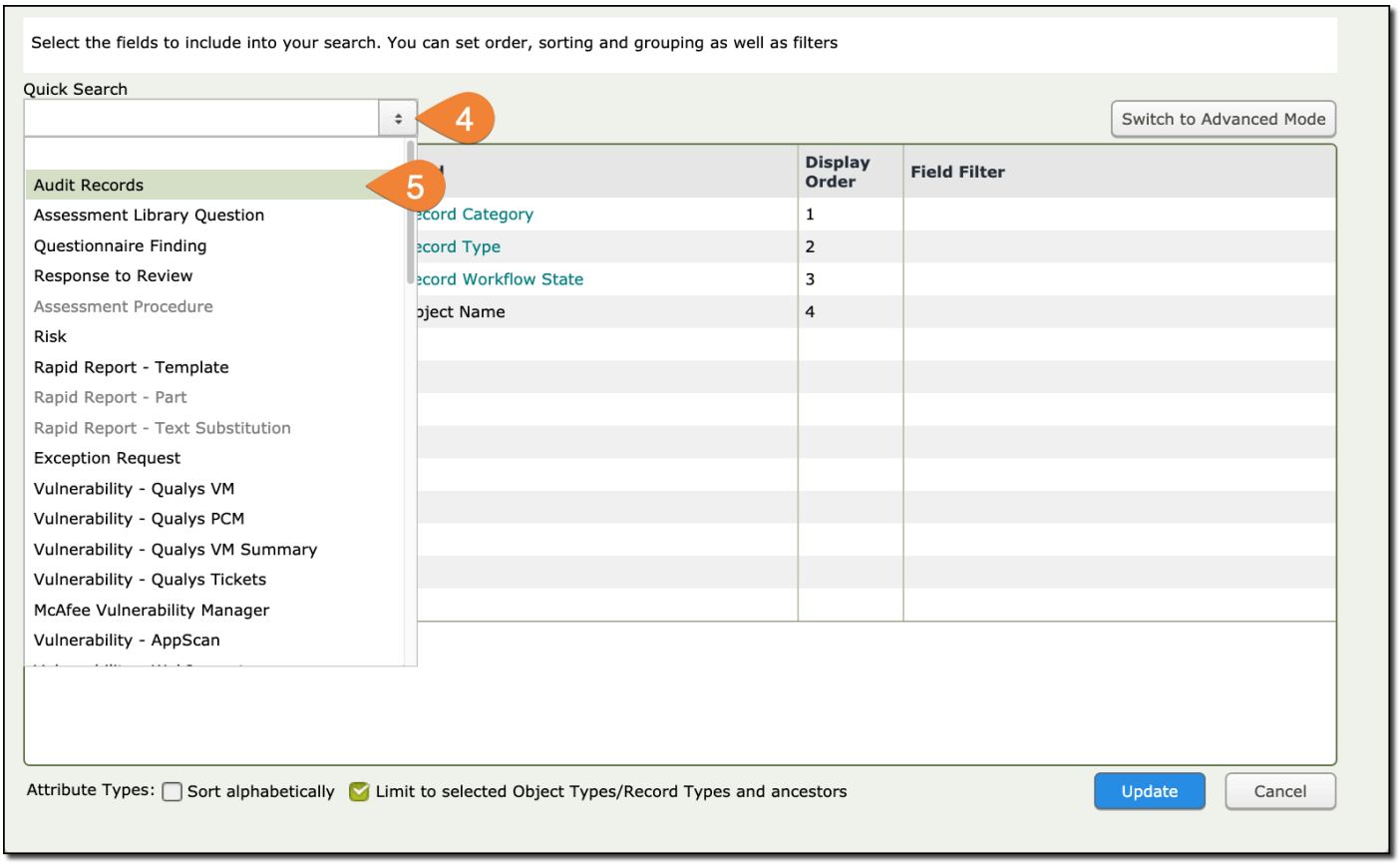
1. Select **Search**
2. Select Saved Searches & Charts



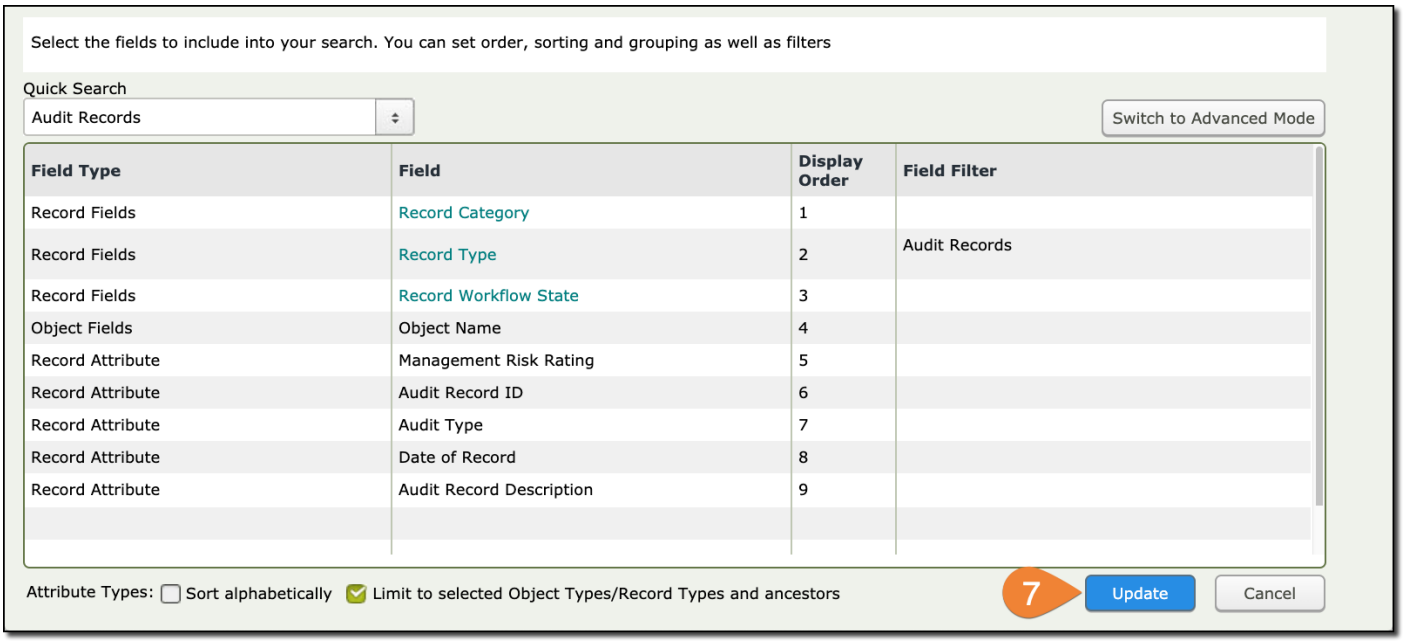
3. Select New Record Search



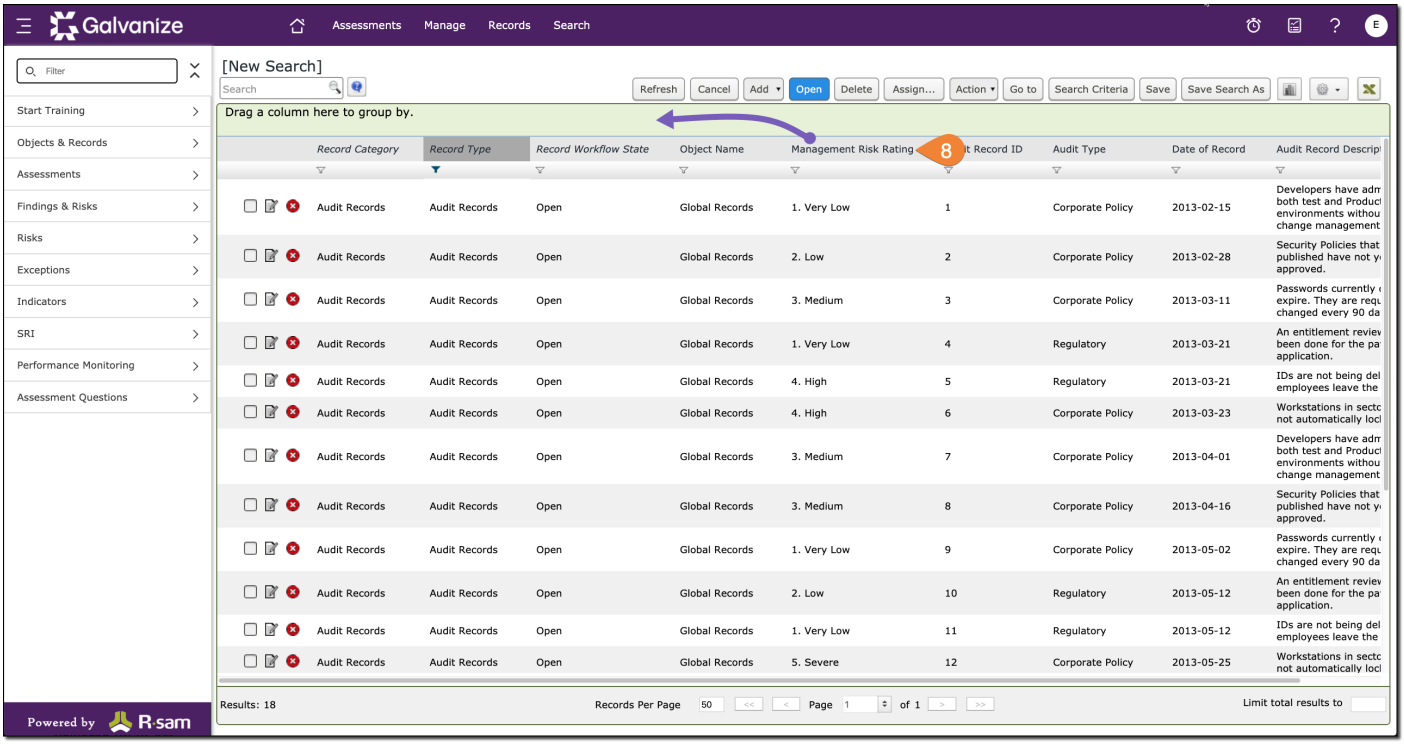
4. Click the drop-down arrows next to **Quick Search**
5. Click Audit Records



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

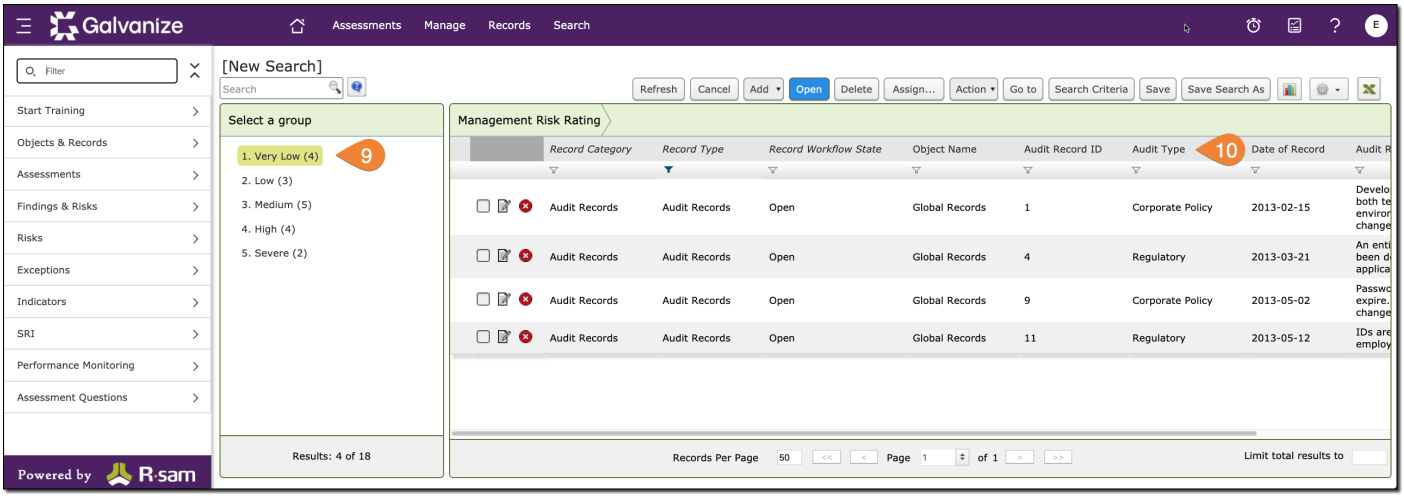


8. Click and drag the heading **Management Risk Rating** to the green pivot area

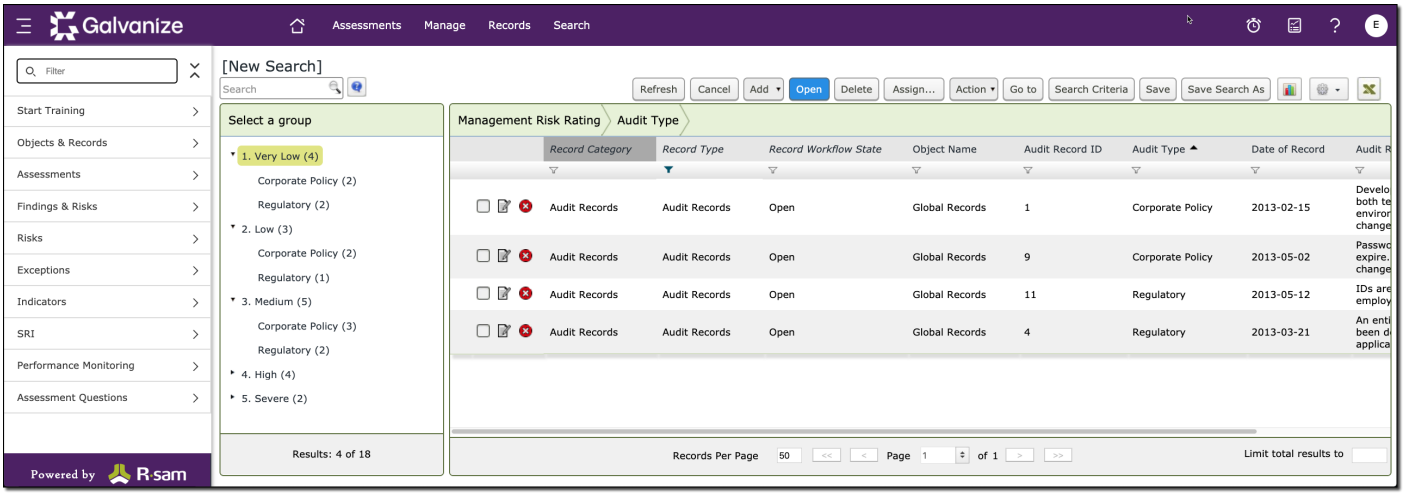


9. Select one of the rating in the **Select a group** area (Very Low, Low, Medium, High or Severe)

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



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



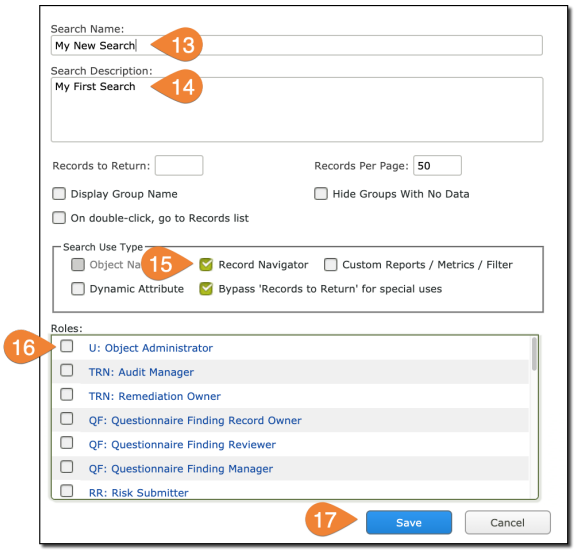
Saving a Search

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**



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.

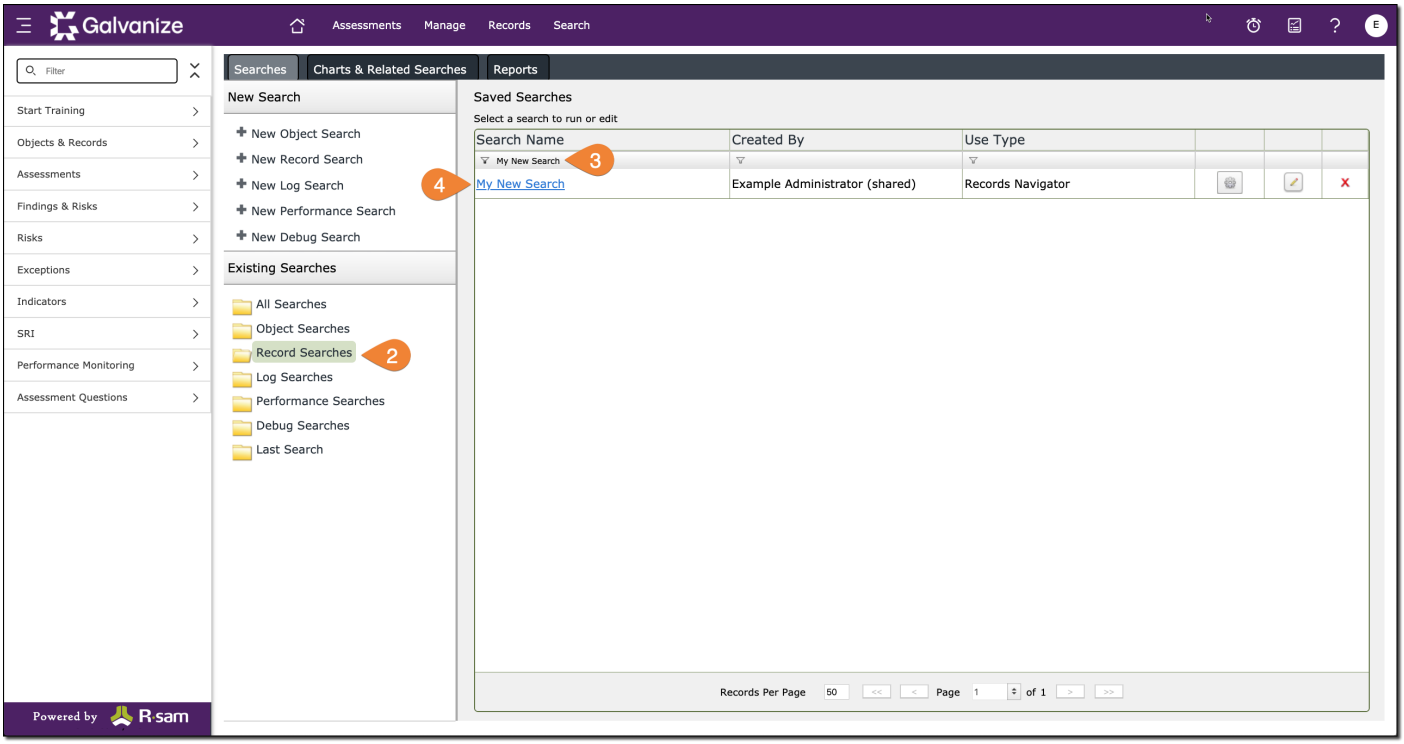
Creating and Saving a Chart

Use the following steps to create a chart based on ab 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.

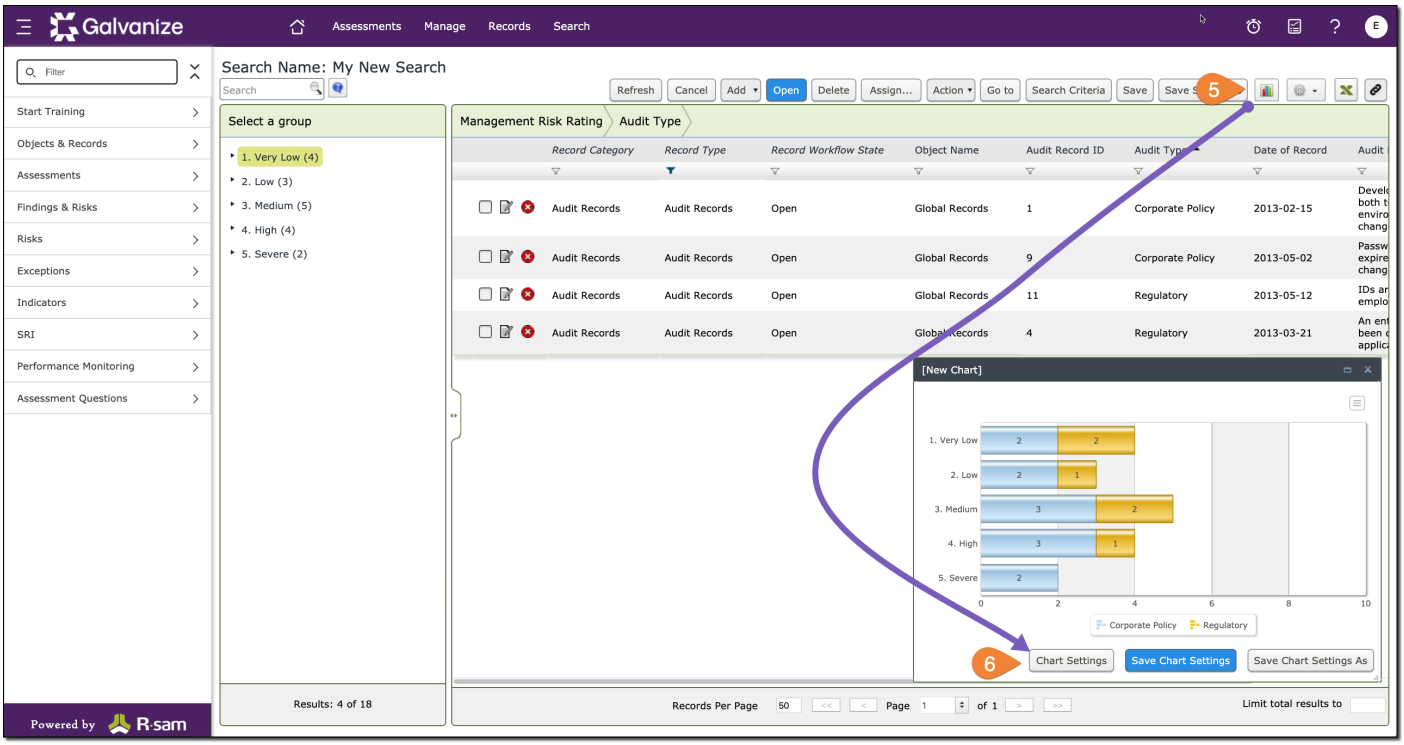
Rsam's powerful drag-and-drop charting feature allows you to create, load, and save charts "on- the-fly". The charting system is directly integrated in the Rsam search feature allowing you to take advantage of the filter and grouping capabilities described in the previous section.

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**.**



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



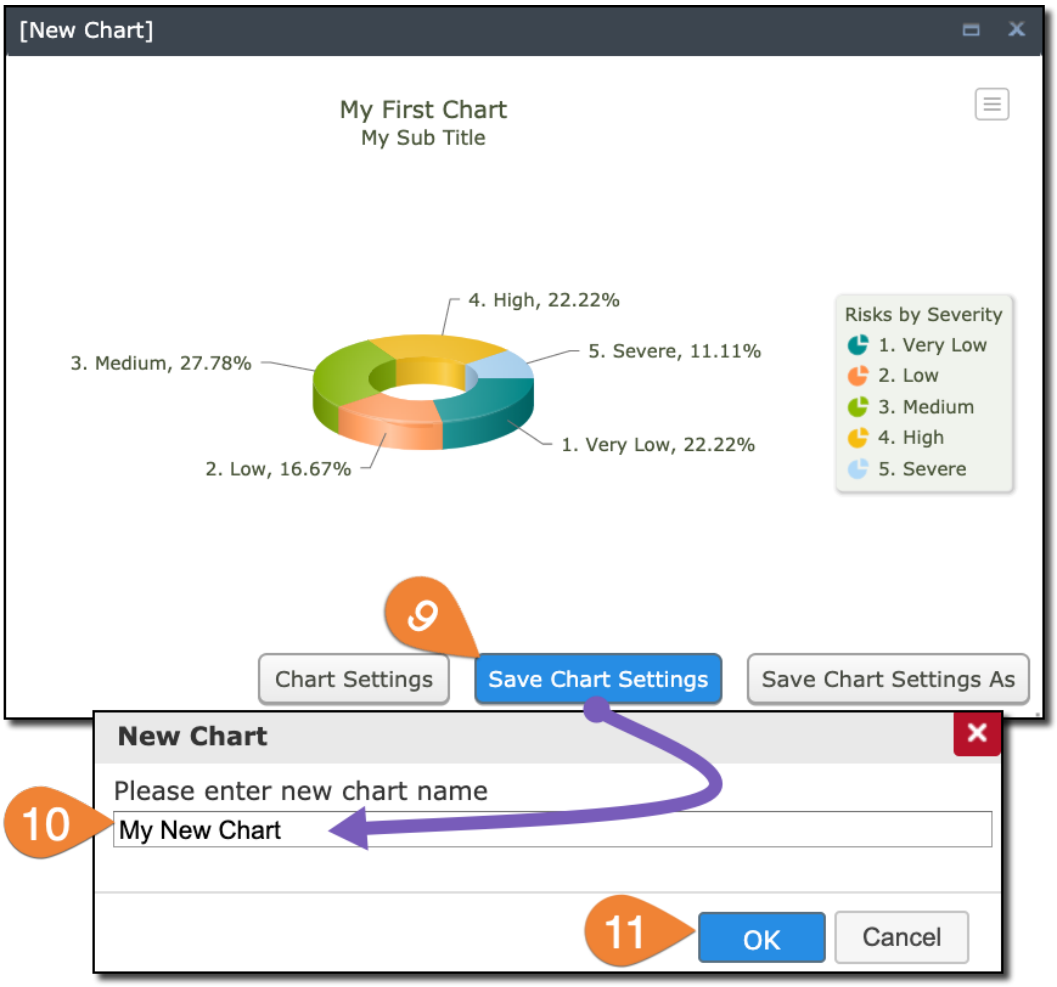
7. Use the table below or your own values to create your chart

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.

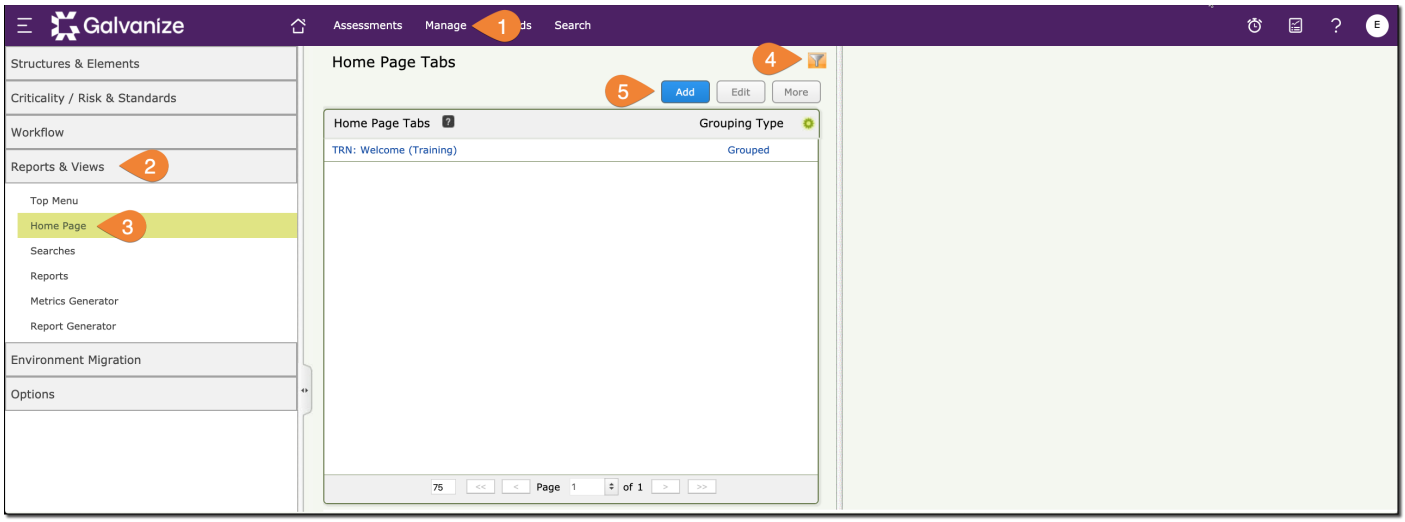

[New Chart]
My First Chart
My Sub Title
4. High, 22.22%
3. Medium, 27.78%
5. Severe, 11.11%
1. Very Low, 22.22%
2. Low, 16.67%
Risks by Severity
1. Very Low
2. Low
3. Medium
4. High
5. Severe
9
Chart Settings
Save Chart Settings
Save Chart Settings As
New Chart
Please enter new chart name
10
My New Chart
11
OK
Cancel

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

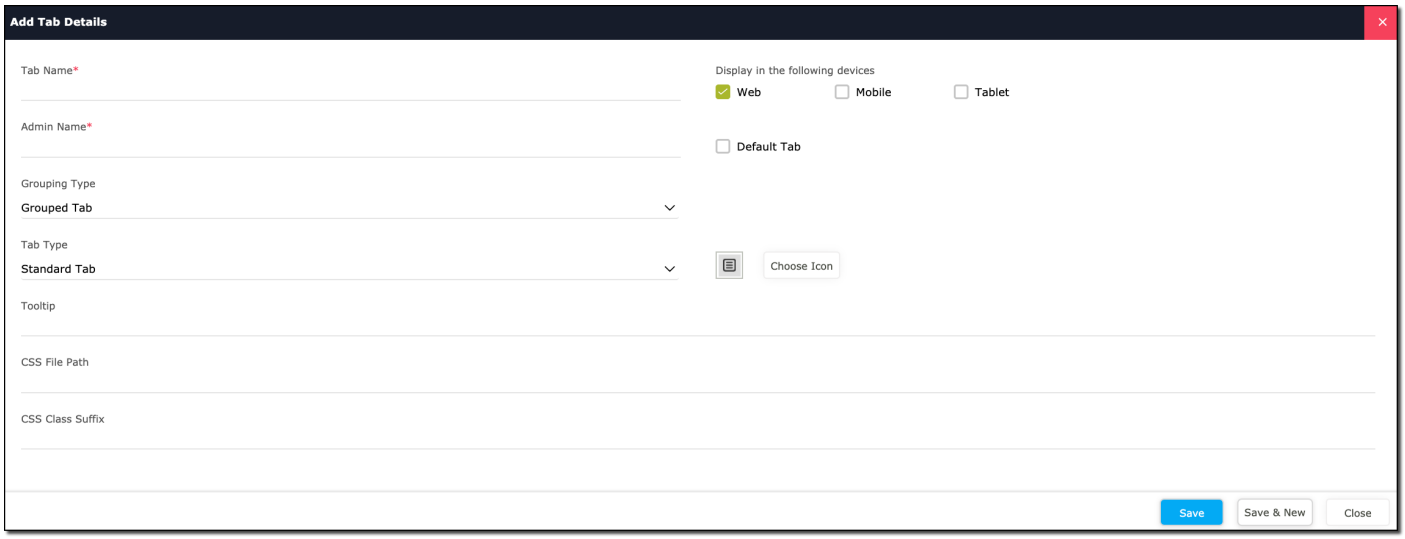
Once you have created and saved a related search and chart, you can place the chart on a home-page tab. In this example, we will create a new grouping home page and two new grouped tabs. To perform this step by using the Web Administration screen.

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
☐ 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	
☐ Default Tab	**Check this option** (This assigns this Home Page to all Roles) Rsam will ask you to confirm this action. Select **"Yes"**

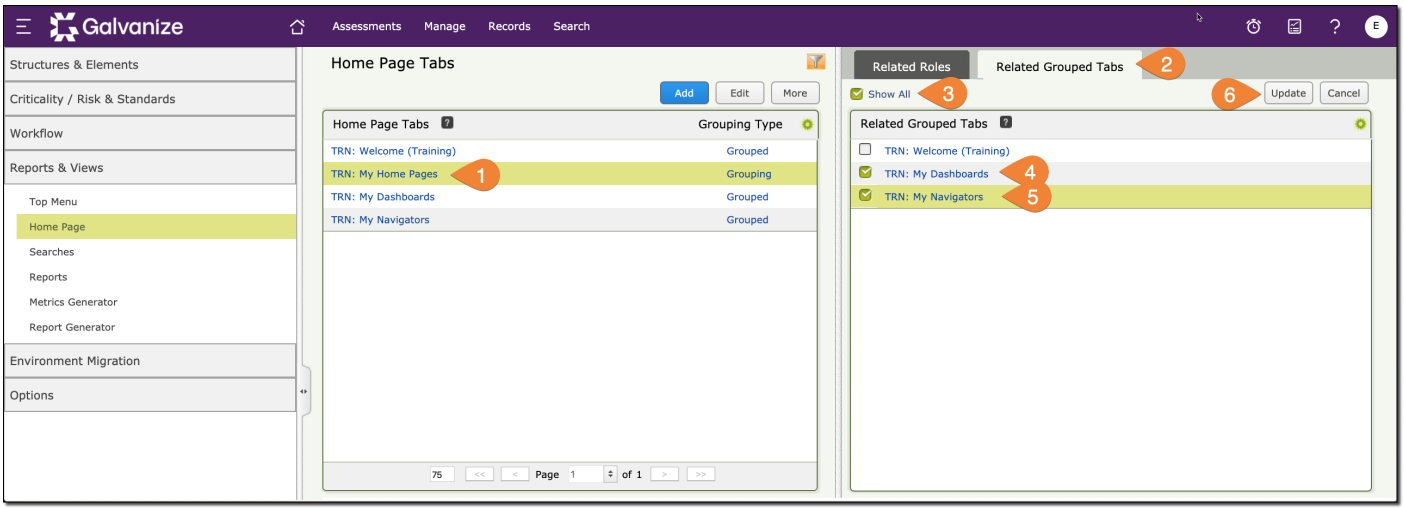
10. Click Save & New
11. Use the table below and follow the same process to enter a **Navigator** tab

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	
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.

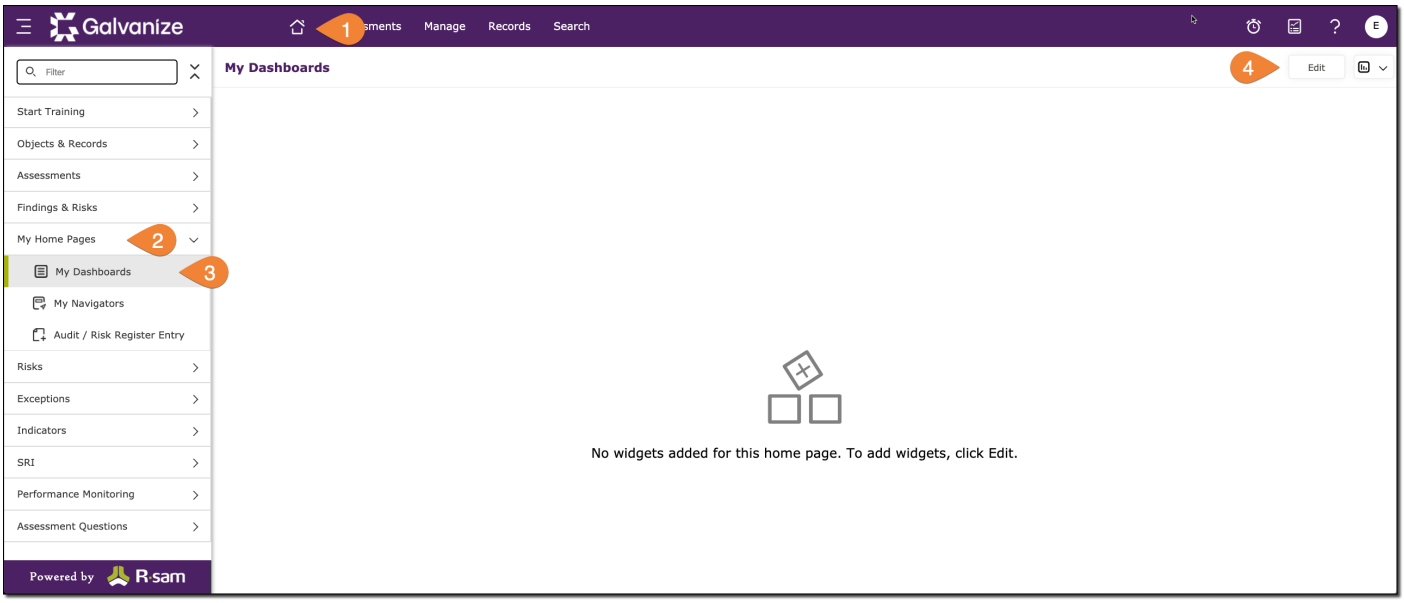
1. Select TRN: My Home Pages
2. On the right-hand menu, select **Related Group Tabs**
3. Make Sure that **Show All** is **checked**
4. Check TRN: My Dashboard
5. Check TRN: My Navigator
6. Click Update



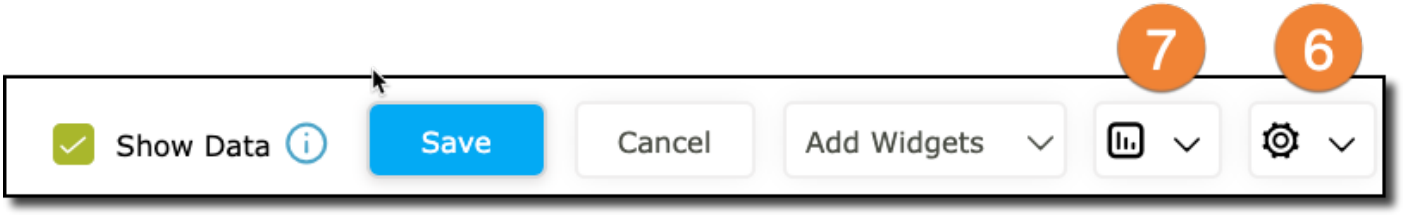
Configuring Home Pages

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.

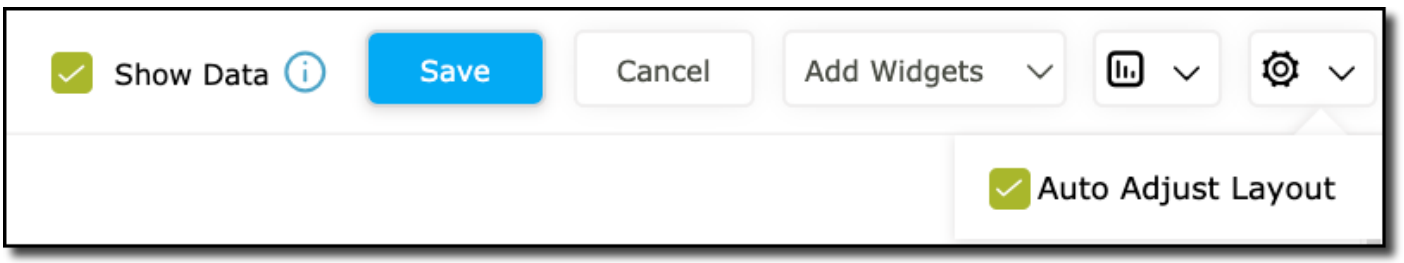
1. Click the **Home** icon
2. Expand My Home Pages
3. Select My Dashboards
4. Click **Edit**



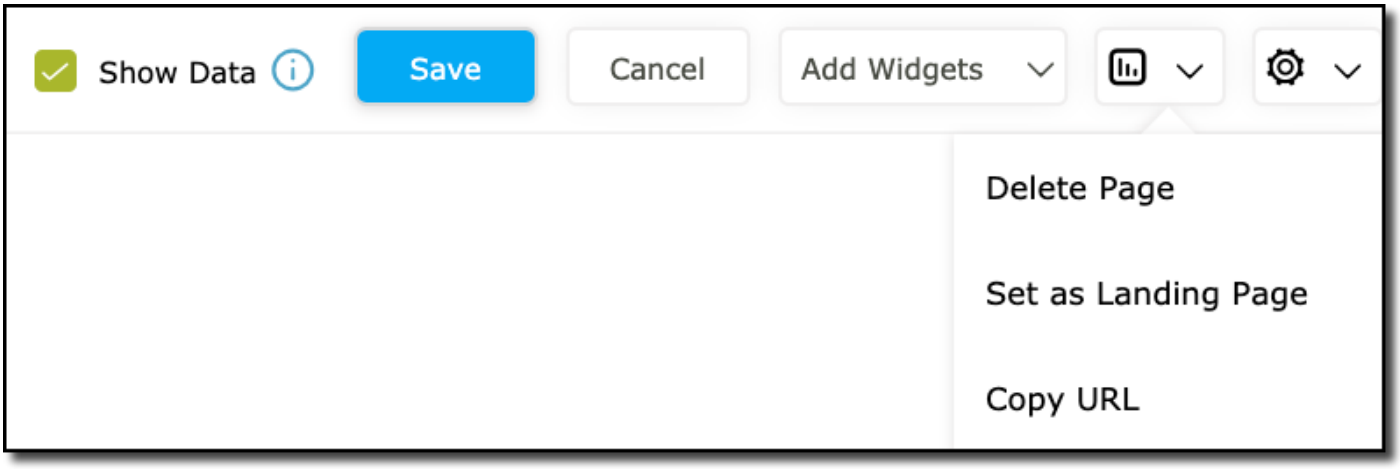
5. The following menu will appear



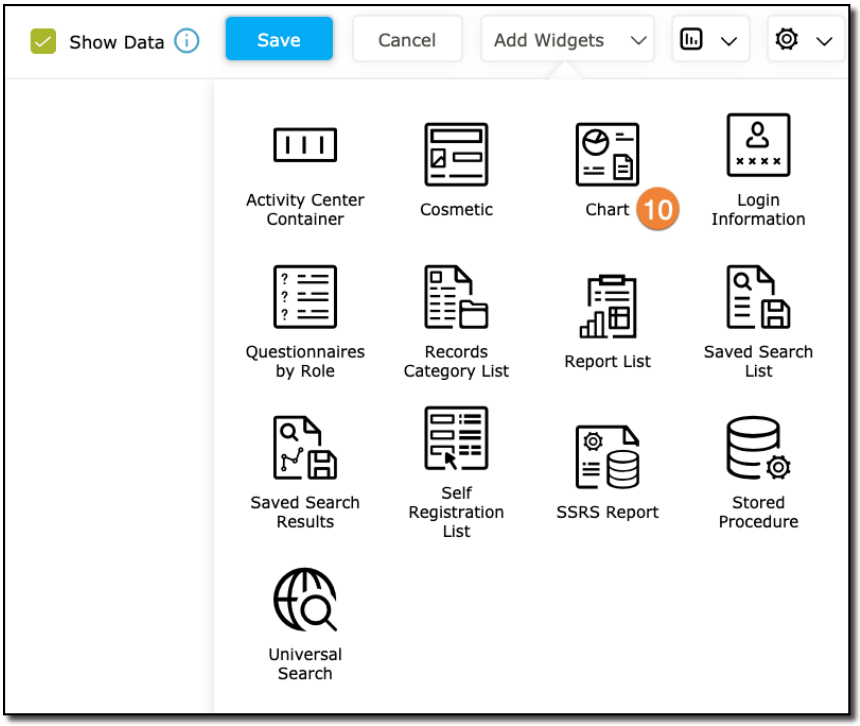
6. This option allows you to set **Auto Adjust** on or off. When switched off you can make very fine adjustment in placement for your widgets. Note that it must be switched on if you plan to add an Activity Center to your Home Page.



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.

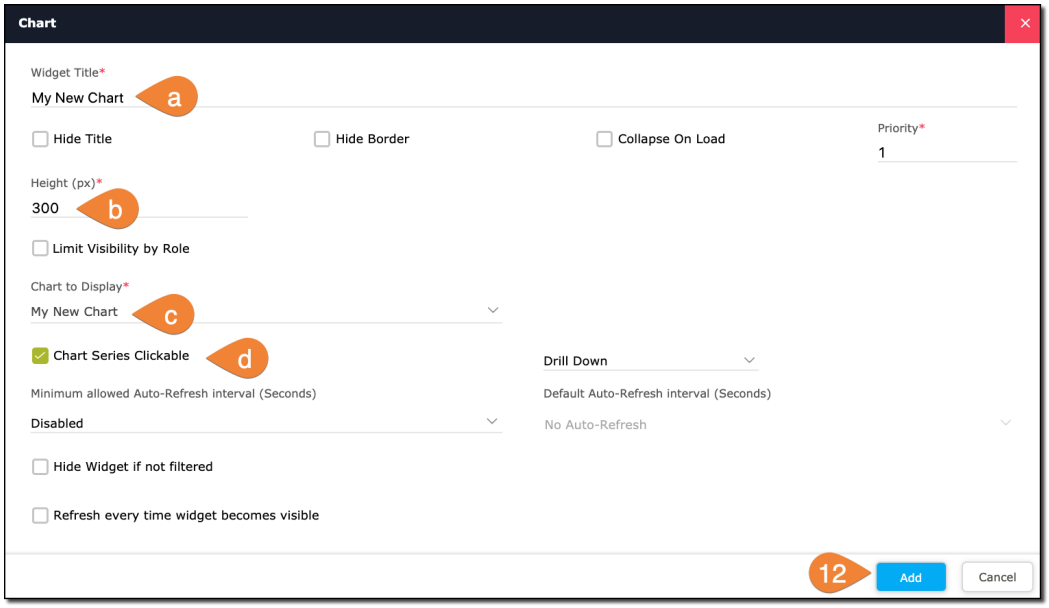


8. Let's add some widgets to the Home Page
9. Click Add Widgets
10. Drag the **Chart** widget to the top of the page

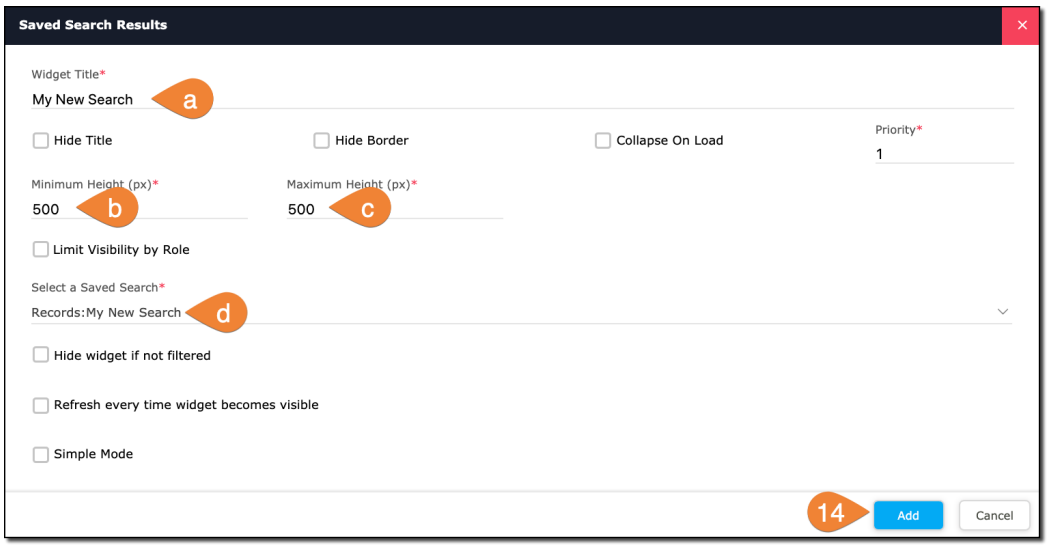


11. The configuration screen will open automatically. Use the following table to enter the default values:
    a. Widget Title: **My New Chart**
    b. Height: **300**
    c. Chart to Display: Select your saved chart **"My New Chart"**
    d. Chart Series Clickable: Selected

12. Click **Add**

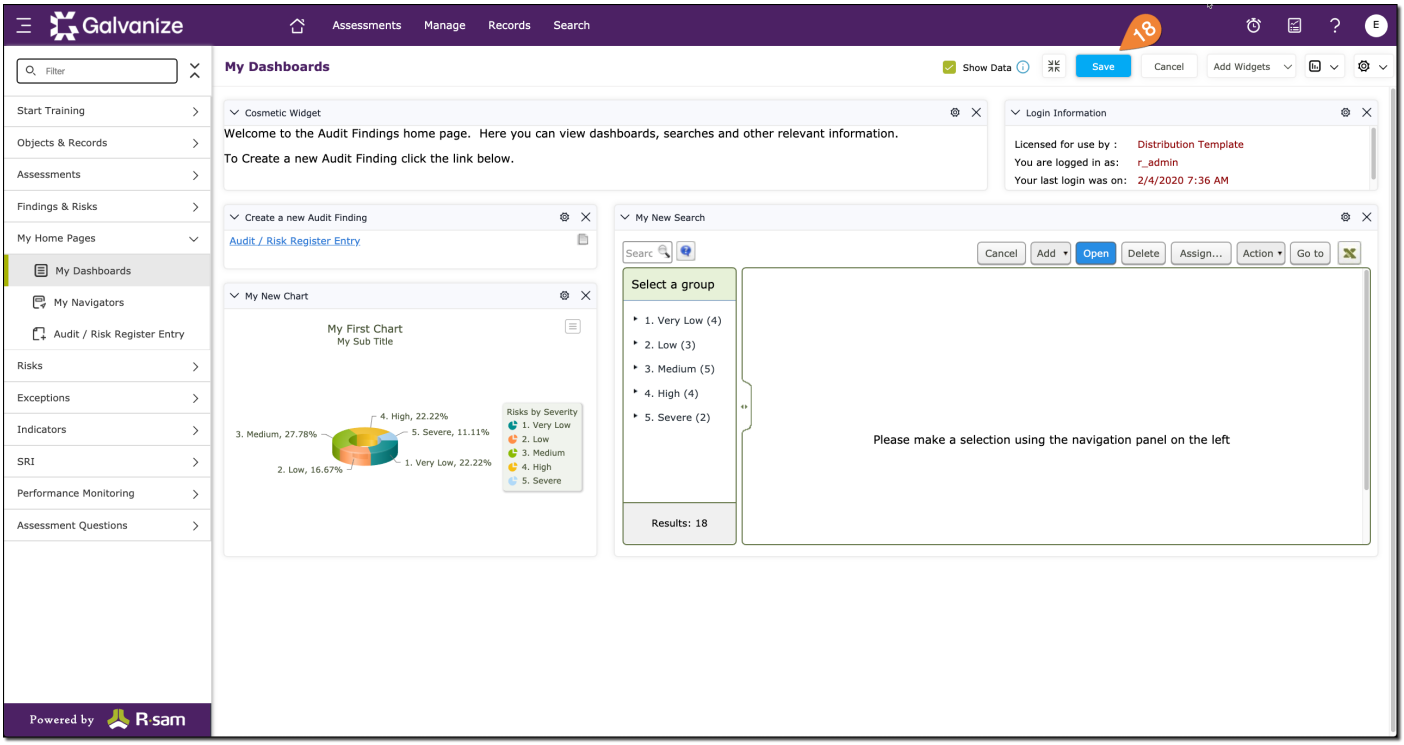


13. Repeat this process but add a **Saved Search Results** widget
    - **a.** Widget Header: **My New Search**
    - **b.** Minimum Height: **500**
    - **c.** Maximum Height: **500**
    - **d.** Select a Saved Search: **Search for "Records: My New Search"**
14. Click Add

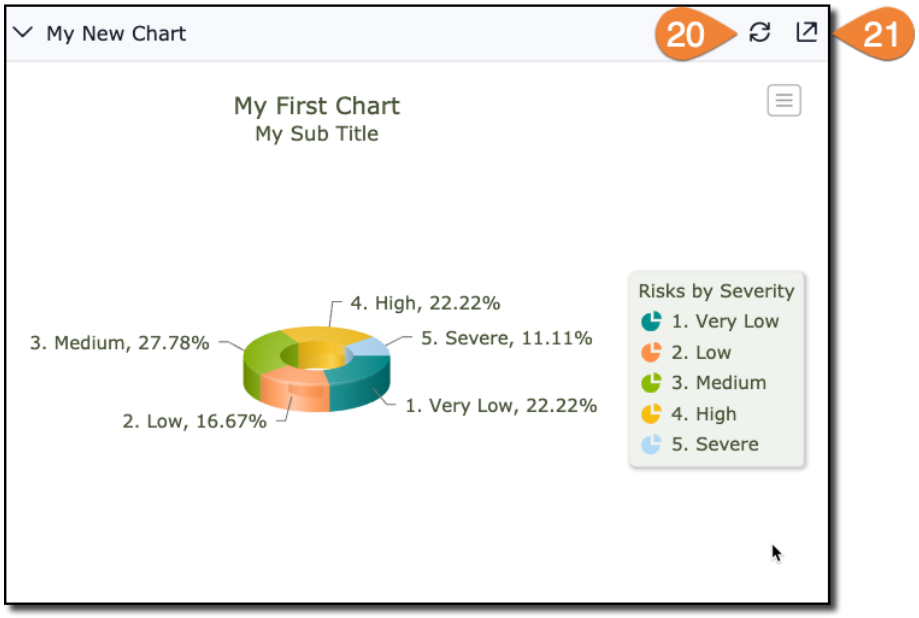


15. Click **Add**
16. Optional: Repeat the process but add a Login Information widget, a Cosmetic widget and a Self Registration List.
17. Design your home page by dragging, dropping, and resizing your widgets. Try designing with both Auto-Adjust on and off.

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



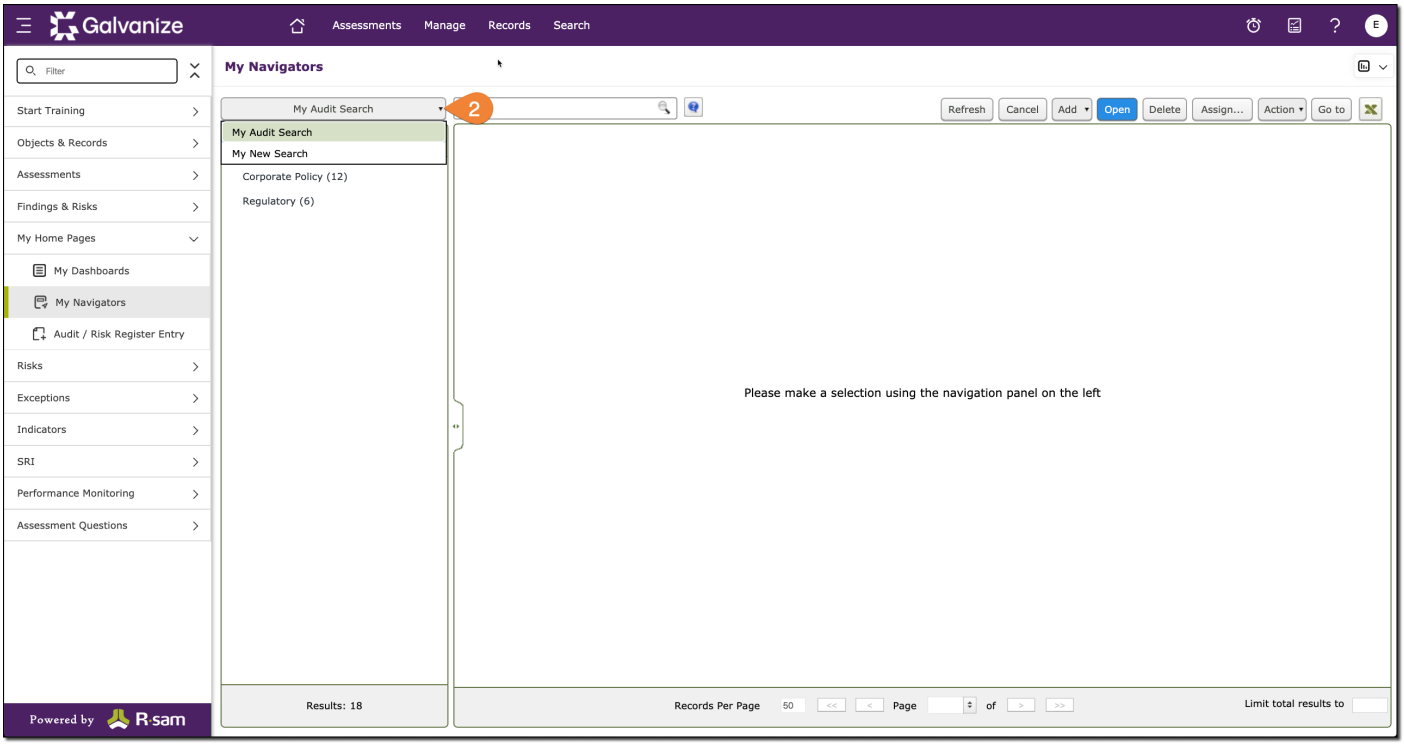
19. Lets explore some other features.
20. You can refresh the information within the widget
21. You can expand Charts to full screen..



Review your Navigators

Steps to Follow:

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



Stop Here

- Take a Break
- Next Session Continues Shortly