



Rsam Platform

HighBond Integration Guide Part 1 & 2 - Initial Set Up & Creating Storyboards from Rsam Saved Searches

Version: 9.2 | January 2020

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About this Guide

This guide is for Rsam Administrators intending to manage the integration between Rsam and HighBond. It provides information on the following topics:

- [Integration Overview](#)
- [Initial Set-Up and Configurations](#)
- [HighBond Access for Rsam Users](#)
- [Navigating to HighBond from Rsam](#)
- [Rsam Saved Searches for HighBond](#)
- [Importing and Exporting Rsam Saved Searches in ACL for Windows](#)
- [Configurations in HighBond](#)

Additional References

- *Rsam Administrator Help* and *Rsam End-User Help* - For detailed information on features of the Rsam framework.
- HighBond [Help Docs](#) page in the Galvanize Community Forum - For more information on the general use and administration of HighBond and related HighBond product components references in this document.
- *Rsam Storyboard Administration Guides* - Rsam Module-specific documents detailing the components of the pre-configured storyboards.

Integration Overview

The integration between Rsam and HighBond allows designated Rsam users to navigate from Rsam into HighBond to view, manage, and share HighBond Storyboards created from Rsam Saved Search data. The integration also allows customers to incorporate data from other data sources and to combine that data with Rsam Saved Search data for presentation in Storyboards.



HighBond Applications

The HighBond platform offers a variety of core capabilities, or *applications*, and this integration leverages three of them: ***HighBond Robots***, ***HighBond Results***, and ***ACL for Windows***.

HighBond Robots allow customers to define robots to automate:

- Querying data from various data sources, including Rsam Saved Searches
- Processing, transforming, and even merging that data with data from other sources
- Publishing that data to the ***HighBond Results*** app.

HighBond Results provides extensive capabilities for visualizing data and presenting it in the form of Storyboards.

ACL for Windows, which includes *Analytics*, is the development environment for building robots. It is installed on a client machine and is where users write the Analytic Scripts that form the robots.

Additional HighBond Definitions

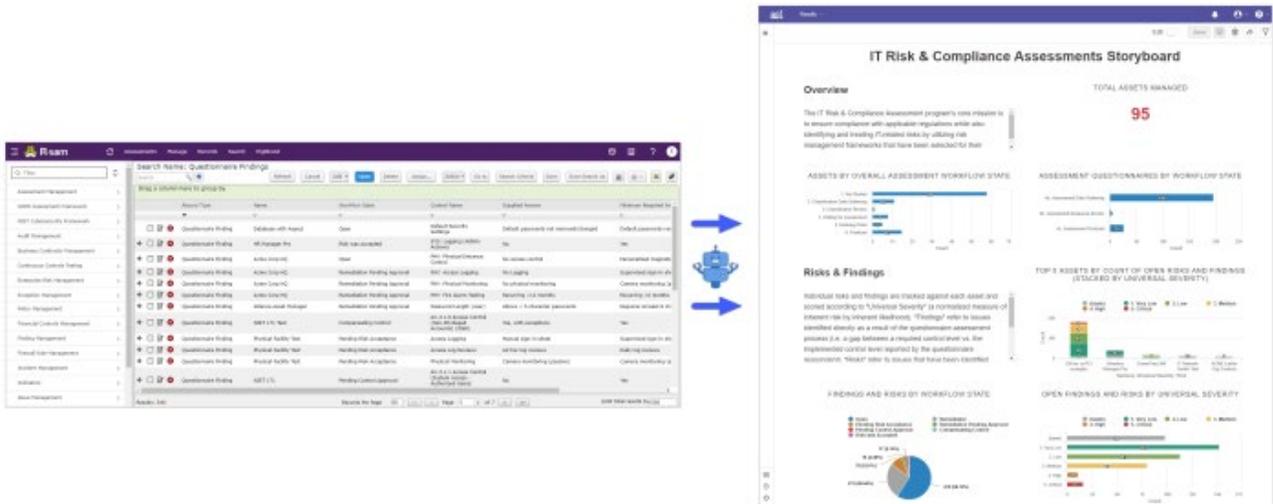
The following are definitions of some additional HighBond terms commonly used in this document:

- **Storyboard** - A HighBond storyboard is a mechanism for combining data visualizations and rich text content into a simple presentation layer that is suitable for consumption by Executive Management and other high-level audiences. Storyboards are part of the *HighBond Results* app.
- **Visualization** - Visualizations are graphical representations of data in the *HighBond Results* application. Visualizations come in the form of charts, metrics, and summary tables, and they are the core building blocks of Storyboards.
- **Collections, Analyses, and Results Tables** - Collections, Analyses, and Result Tables are various levels of *containers* in the *HighBond Results* app that are used to organize the underlying data presented in Storyboards. Collections are at the highest level. A collection can have multiple Analyses, and one Analysis can have multiple Result Tables. A Result Table can have multiple Visualizations, and a Storyboard can incorporate Visualizations from across multiple Collections (each pre-configured Storyboards from Rsam, however, maps one-to-one with a specific Collection).
- **Analytic Scripts** - Analytic Scripts are created using commands that import data, process it, and write it to designated Result Tables. Analytic Scripts can be executed using the local *ACL for Windows* desktop client, or they can be executed automatically on a scheduled basis using *ACL Robotics*.
- **ACL for Windows** – ACL for Windows is a desktop application that allows users to develop and execute analytics scripts from their local desktop environments. ACL for Windows includes a number of pre-configured data connectors, including the Rsam Connector, that allows ACL for Windows to connect to and import data from remote data sources. ACL for Windows can also publish results directly to the cloud-based *HighBond Results* app.
- **Robots** – Robots are agents in the *ACL Robotics* application that can automatically perform the functions that a user would execute manually in ACL for Windows (executing analytic scripts to pull data from designated data sources, processing that data, and publishing results to the HighBond Results app). Pre-defined analytic scripts can be executed on a scheduled basis, either from a cloud-based or on-premise robot agent, eliminating the need for manual execution from the ACL for Windows desktop environment.

Features & Benefits

This section explains some of the specific features and benefits that the integration provides to Rsam users:

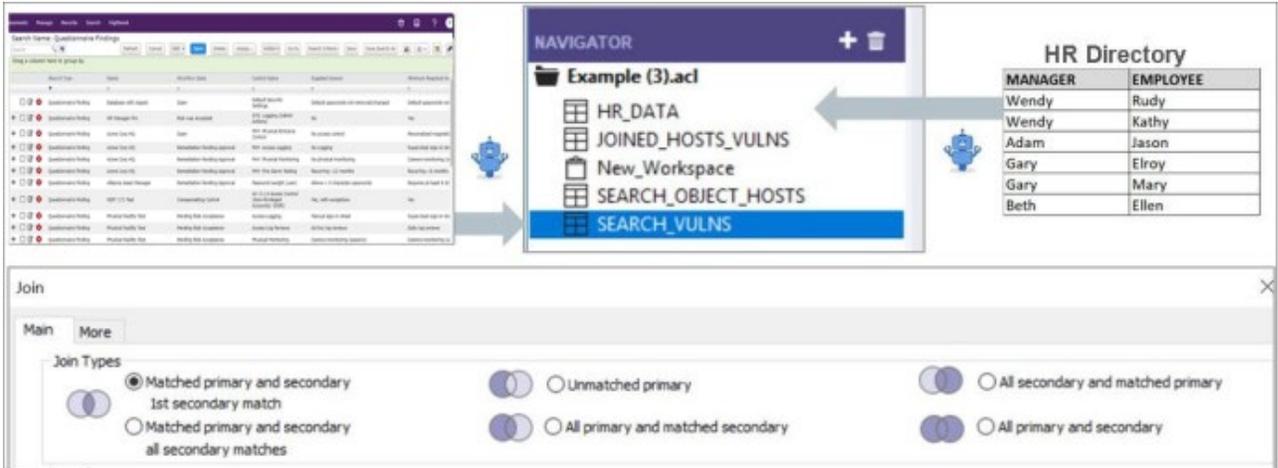
- **Create and share HighBond Storyboards built from Rsam Saved Searches** - HighBond Storyboards secure the attention of executive-level audiences by the addition of visualizations.



- **Utilize powerful data analytics to process, transform, and summarize Rsam data to create actionable insights** - Present Rsam information in whatever way is most appropriate to your target audience.



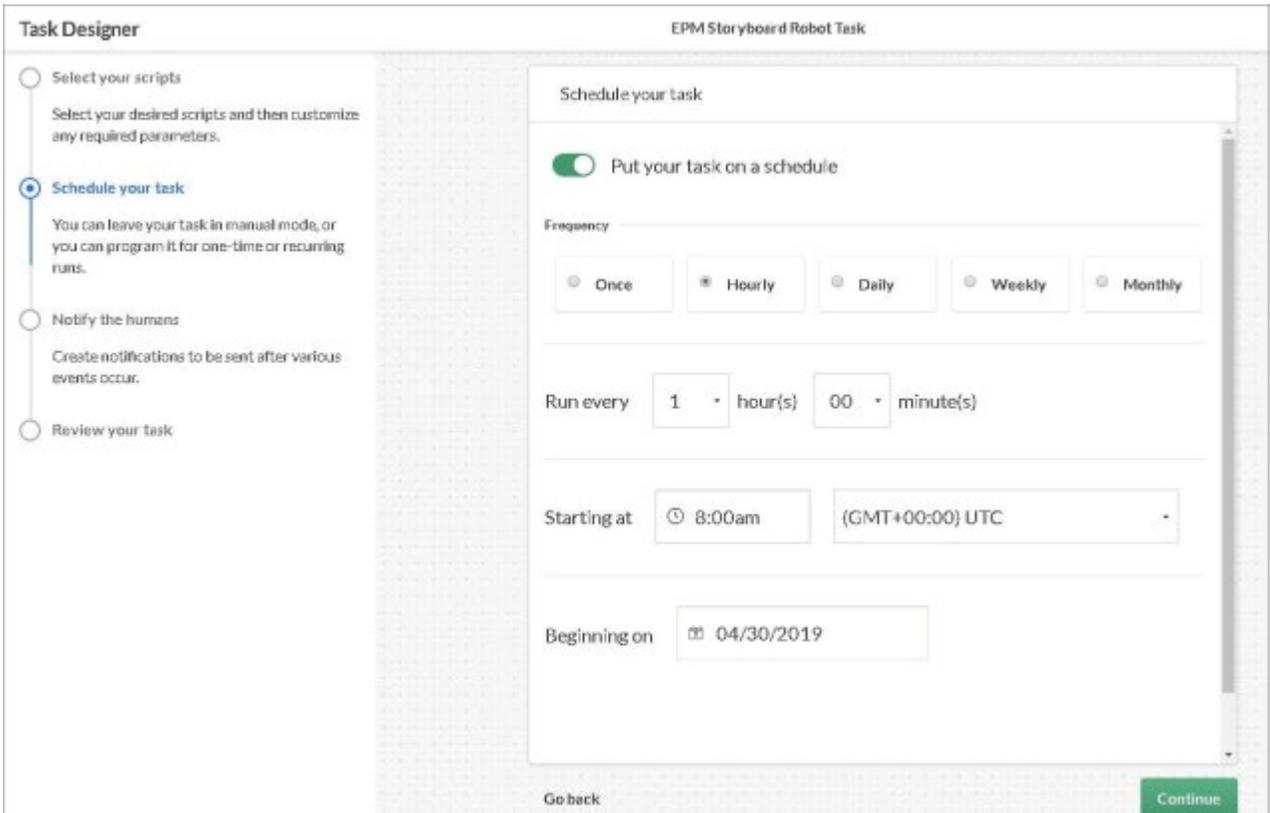
- Combine data from other data sources to tell a more comprehensive story about your organization's IT risk posture** - Critical IT risk information may not reside only in Rsam and can be scattered throughout your entire IT infrastructure. *ACL Robotics* lets you combine data from these data sources for a comprehensive data presentation.



The screenshot illustrates the ACL Robotics interface for data integration. On the left, a table lists various Rsam saved searches. In the center, a 'NAVIGATOR' pane shows a workspace named 'Example (3).acl' containing several data sources: 'HR_DATA', 'JOINED_HOSTS_VULNS', 'New_Workspace', 'SEARCH_OBJECT_HOSTS', and 'SEARCH_VULNS'. On the right, an 'HR Directory' table lists managers and employees. Below these elements, a 'Join' dialog box is open, showing 'Join Types' with options for matching primary and secondary data from different sources.

MANAGER	EMPLOYEE
Wendy	Rudy
Wendy	Kathy
Adam	Jason
Gary	Elroy
Gary	Mary
Beth	Ellen

- Automate with robots so that Storyboards are always up-to-date with changing Rsam data** - You can configure the robots to automatically update your storyboards with the data changes in Rsam. Robots work around the clock to keep it all together as configured.

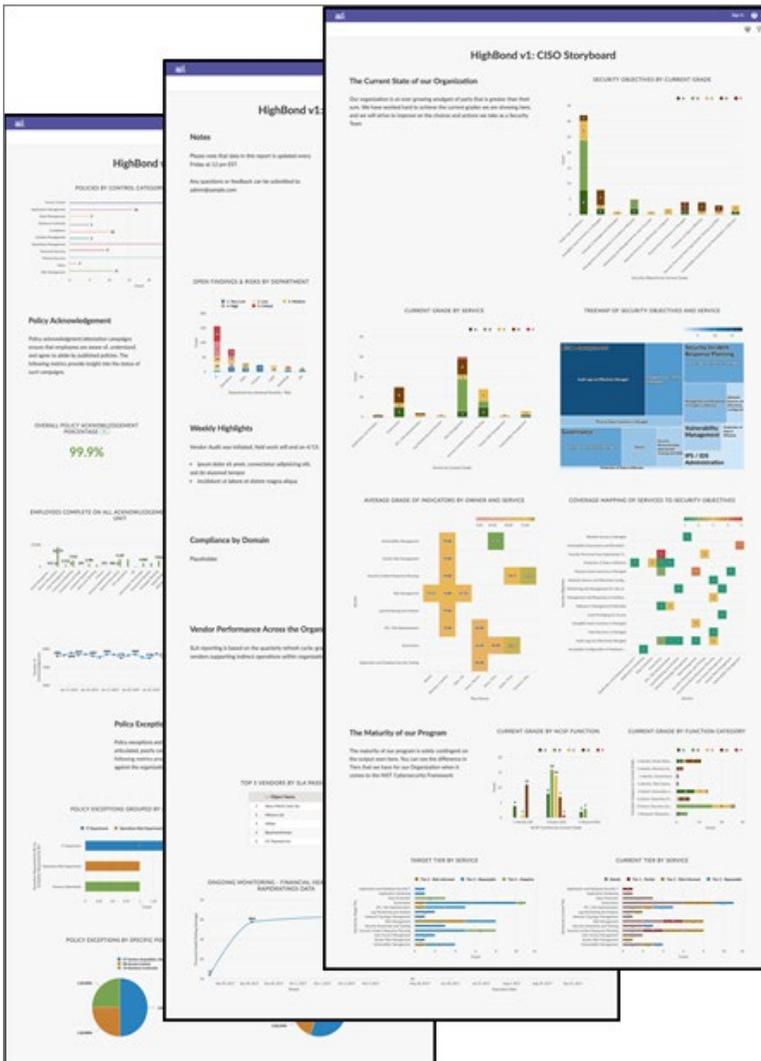


The screenshot shows the 'Task Designer' interface for an 'EPM Storyboard Robot Task'. The 'Schedule your task' section is active, with a toggle for 'Put your task on a schedule' turned on. The frequency is set to 'Hourly', and the task is configured to run every 1 hour and 00 minutes, starting at 8:00am (GMT+00:00) UTC, beginning on 04/30/2019. A 'Continue' button is visible at the bottom right.

- SSO authentication provides seamless navigation to Storyboards directly from Rsam:** Drives user adoption by ensuring that Storyboards feel like an extension to the Rsam platform that users already know.



- Pre-configured Storyboards for customers who own designated modules -** Leverage pre-configured storyboard components as starting points to drive quick time to value.



Initial Set-Up and Configurations

Rsam and HighBond Technical Support Teams will have carried out a series of activities to establish the integration between Rsam and HighBond. These activities include but are not limited to the following:

- Setting up your customer-specific organization in HighBond
- Upgrading your Rsam environment to version 9.2.2209.2 (or later)

Note: Customers having Rsam installed on-premise will need to upgrade Rsam by themselves. However, they can contact *Rsam Technical Support* for any queries.

- Establishing the basic *hand shake* that allows Rsam and HighBond to communicate securely

Activities that an Rsam Administrator will need to configure to make the integration useful to Rsam users are as follows:

- [Designating Users for ACL for Windows and Robots](#)
- [Scheduling and Running the User Synchronization Task](#)
- [Enabling an Rsam Saved Search for HighBond](#)
- [Configuring ACL for Windows Desktop Client](#)
- [Importing an Rsam Saved Search into ACL for Windows](#)

Note: If on-premise customers want to automate the storyboard creation in HighBond, it is required to configure the Robots Agent. For more information, refer *Rsam HighBond Integration Guide Part 3 - Automating Storyboards with Robots*.

Enabling Inbound API Access for Rsam Users (for ACL for Windows)

When a user connects to Rsam from ACL for Windows for importing saved searches, they will leverage their Rsam user account to establish this connection. To enable that connection, their Rsam user account must be granted access to the Inbound API.

Rsam users must be granted access to Rsam Inbound API before they can connect to Rsam through ACL for Windows. This document assumes that any Rsam users who would use ACL for Windows would likely be Administrator users. However, it is also possible to grant access to standard users as required.

Single-Sign On (SSO) Scenario

If Single-Sign On is enabled in an environment, the following considerations must be met:

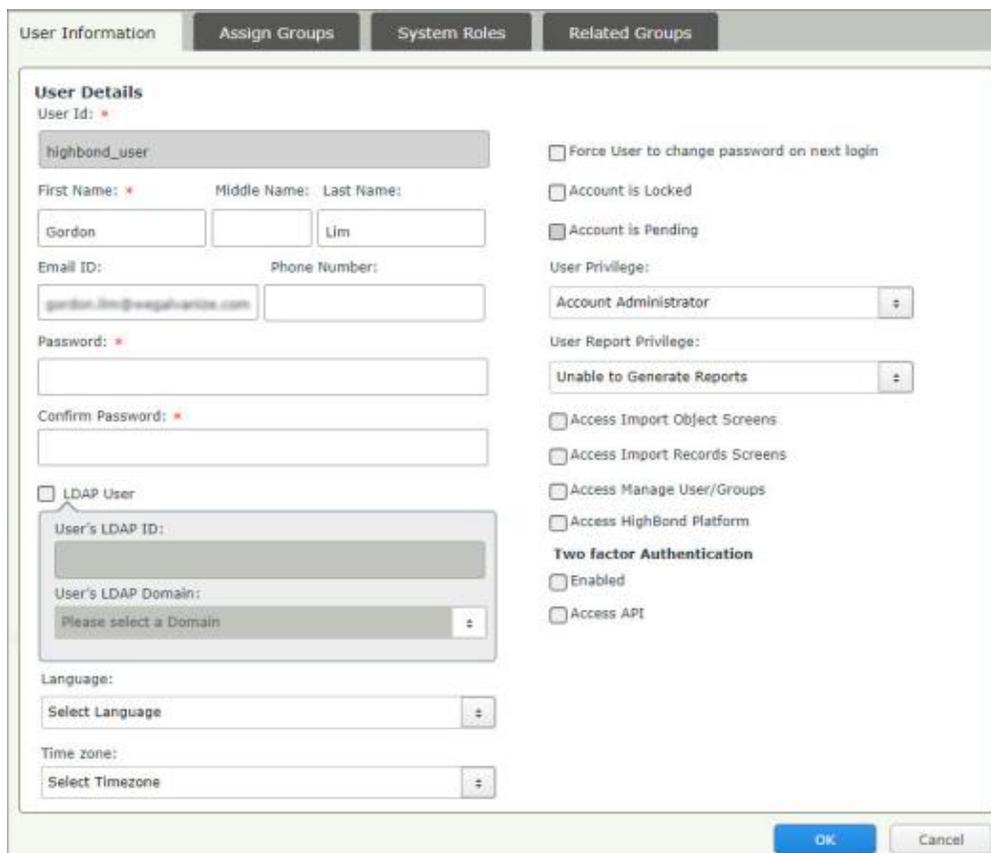
- Currently, redirects through Rsam to HighBond and does not allow a user to bypass SSO. The Rsam Admin account(s) that will sync with HighBond must use SSO.
- Though a customer is using SSO, they may also use local accounts, typically Admin accounts. If the customer wants to retain local Admin Accounts, then an additional Admin account must be set up to use SSO and licensing for that user must be updated in both HighBond and Rsam. Alternatively, the customer can assign Admin privileges to an existing SSO user.
- When using ACL for windows through SSO, the API key must be used.

To grant API Access to Rsam users so that they can connect to Rsam from ACL for Windows, perform the following steps:

1. Log in to Rsam as an *Administrator*.
2. Navigate to **Manage > Users/Groups**. The **Manage Users** page appears.
3. Select the required user.

Note: It is recommended that the provisioned user be a HighBond Admin with permission to create and modify visualizations, storyboards, etc. in HighBond.

The **User Details** page appears.



4. Select the check box corresponding to **Access HighBond Platform** and then select **HighBond Admin** in the drop-down list that appears.

Note: Ensure the email of the user is provided in the **Email ID** field. HighBond uses an email address as the unique ID for a user. Therefore, all Rsam users that will sync with HighBond must have a unique email address in their user record in Rsam. If more than one user account is synced for a single user with HighBond, each additional account must have a unique email address. The additional email accounts can be aliases of the primary account if the mail server supports it.

5. Select the check box corresponding to **Access API**. The **Permanent API key details** section appears.



6. Click **OK** to save the user details.

Make sure to save the RSAM user profile after the API key has been generated. Otherwise, the API key will not work.

Scheduling and Running the User Synchronization Task

While deploying the integration upgrade on Rsam, the scheduler task to sync users is also generated by the Rsam utility.

Note: This task must be associated to a schedule and will then run automatically as scheduled.

A user to be synced must either have a blank phone number or a number that has at least 10 characters.

Users can also run the task manually, as required. When the task runs, all users marked to be provided access to HighBond, are granted access, based on the System Role defined.

To view the User Sync Task and associate it to a schedule, perform the following steps:

1. Click  (Scheduler icon) in the top navigation menu. The **Scheduler** page opens.
2. In the Schedules tab, click **Add** to add a new schedule. The **Rsam Add/Modify Schedule** dialog box appears.

- Provide a name for the schedule and define the details for the schedule as required. The following image shows an example schedule.

- Click **Save** to save the schedule. The schedule is added to the list.
- Select the schedule.
- In the **Tasks** section, at the bottom of the dialog box, scroll down to view and select the task - *Sync HighBond Instance*.

Schedules			Tasks																																												
<p>Schedule Auto Refresh <input checked="" type="checkbox"/> Add Modify Delete</p> <table border="1"> <thead> <tr> <th>NAME</th> <th>DESCRIPTION</th> <th>STATUS</th> </tr> </thead> <tbody> <tr> <td>Enterprise Nightly Schedule</td> <td>Run every 1 day(s) starting on 2016-01-28 at 16:11 ending on 2050-06-24</td> <td>ENABLED</td> </tr> <tr style="background-color: #ffffcc;"> <td>HighBond User Sync Schedule</td> <td>Run every 1 day(s) starting on 2019-04-10 at 02:47 ending on 2020-04-10</td> <td>ENABLED</td> </tr> <tr> <td>SIRP_Increment_Year</td> <td>Run on 1 day of Jan starting on 2017-01-01 at 00:01 ending on 2099-01-01</td> <td>ENABLED</td> </tr> <tr> <td>VEN DNB - Ongoing Monitoring</td> <td>Run on 1 day of Jan, Apr, Jul, Oct starting on 2016-08-01 at 01:00 ending on 2050-12-31</td> <td>ENABLED</td> </tr> <tr> <td>VM Metrics</td> <td>Run once on 2017-12-18 at 18:41</td> <td>ENABLED</td> </tr> </tbody> </table>								NAME	DESCRIPTION	STATUS	Enterprise Nightly Schedule	Run every 1 day(s) starting on 2016-01-28 at 16:11 ending on 2050-06-24	ENABLED	HighBond User Sync Schedule	Run every 1 day(s) starting on 2019-04-10 at 02:47 ending on 2020-04-10	ENABLED	SIRP_Increment_Year	Run on 1 day of Jan starting on 2017-01-01 at 00:01 ending on 2099-01-01	ENABLED	VEN DNB - Ongoing Monitoring	Run on 1 day of Jan, Apr, Jul, Oct starting on 2016-08-01 at 01:00 ending on 2050-12-31	ENABLED	VM Metrics	Run once on 2017-12-18 at 18:41	ENABLED																						
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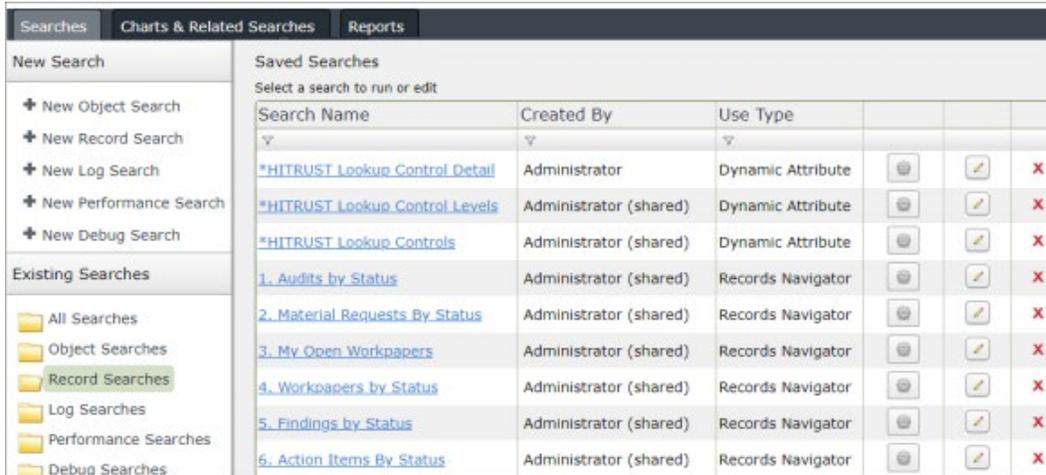
- Click **Update** to save the association.
- To manually run the task for the first time, select the task and click **Run**. Click **OK** in the confirmation message that appears.

Note: The timezones Australia/Eucla, Australia/LHI, Australia/Lord_Howe, Etc/GMT+12, Etc/GMT-14, Pacific/Kiritimati, Pacific/Marquesas, and GMT-0 are not supported in HighBond. If users have any of these are the preferred timezone, the default timezone will be used in HighBond.

Enabling an Rsam Saved Search for HighBond

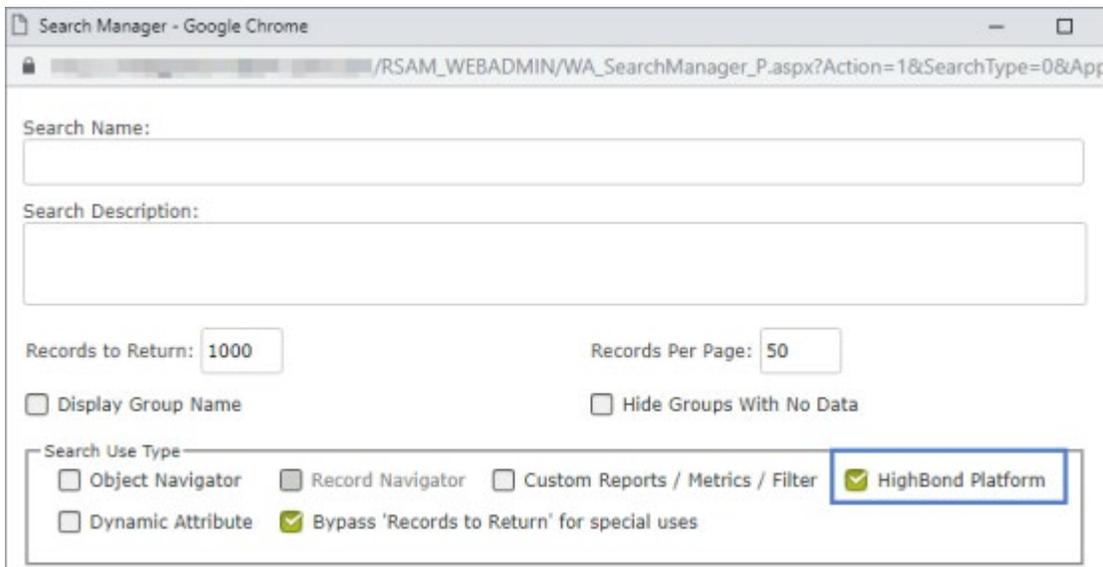
To designate an Rsam Saved Search to be used with HighBond, perform the following steps:

1. Log in to Rsam as a user with access to the required saved search.
2. Navigate to **Search > Saved Searches & Charts**.



Search Name	Created By	Use Type			
*HITRUST Lookup Control Detail	Administrator	Dynamic Attribute	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*HITRUST Lookup Control Levels	Administrator (shared)	Dynamic Attribute	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*HITRUST Lookup Controls	Administrator (shared)	Dynamic Attribute	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1. Audits by Status	Administrator (shared)	Records Navigator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2. Material Requests By Status	Administrator (shared)	Records Navigator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. My Open Workpapers	Administrator (shared)	Records Navigator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Workpapers by Status	Administrator (shared)	Records Navigator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5. Findings by Status	Administrator (shared)	Records Navigator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6. Action Items By Status	Administrator (shared)	Records Navigator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

3. Create a new search or open an existing search and click **Save Search As**. The **Search Manager** dialog box appears.
4. Provide the required details for the Search and select the check box corresponding to **HighBond Platform** in the **Search Use Type** section.



Search Name:

Search Description:

Records to Return: Records Per Page:

Display Group Name Hide Groups With No Data

Search Use Type

Object Navigator Record Navigator Custom Reports / Metrics / Filter HighBond Platform

Dynamic Attribute Bypass 'Records to Return' for special uses

This option is available for Rsam Saved Searches only once the HighBond integration has been established in the Rsam instance.

5. Click **Save** to save the search.

For information on using the HighBond-enabled Rsam Saved Searches, see [Importing an Rsam Saved Search into ACL for Windows](#).

ACL for Windows Desktop Client

ACL for Windows is a desktop client that serves two primary purposes when creating Rsam Storyboards:

- Serves as a user interface for manually connecting to an Rsam instance, importing a Saved Search result, and publishing that result to HighBond.
- Serves as a local development environment for creating and testing analytic scripts that can be automated using robots. For more information, refer to the *Automating Storyboards with Robots* document.

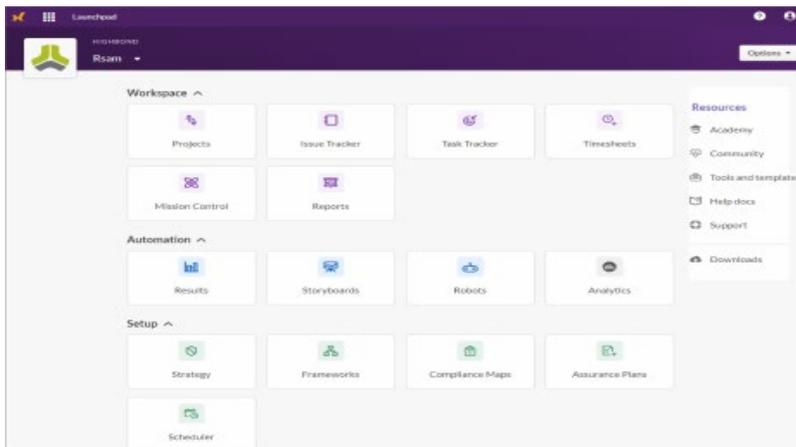
This section explains the following topics:

- [Installing ACL for Windows](#)
- [Activating ACL for Windows](#)
- [Configuring the Rsam Data Source in ACL for Windows](#)

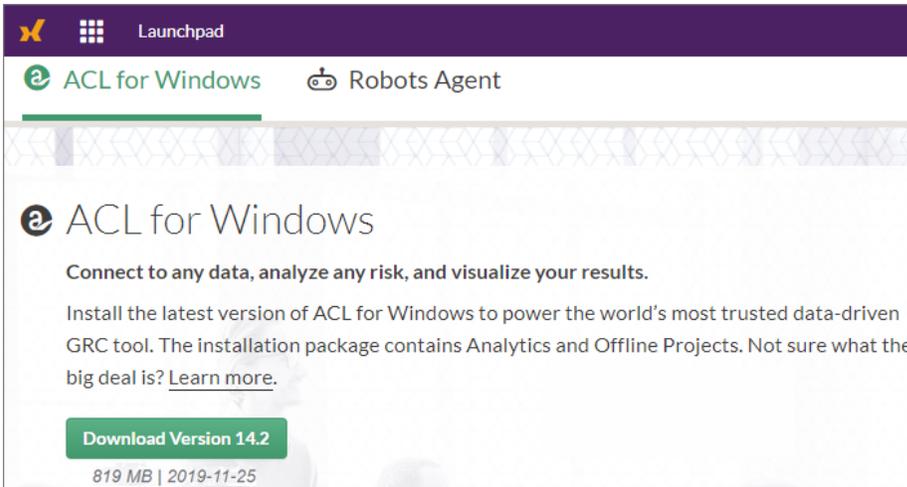
Installing ACL for Windows

To install the ACL for Windows desktop client, perform the following steps:

1. From your Rsam instance, navigate to **HighBond > Launchpad**. The HighBond **Launchpad** appears.



2. Navigate to **Resources > Downloads** in the Launchpad.
3. Click **Download Version 14.x** in the **ACL for Windows** tab. The installer is downloaded to your **Downloads** folder.



4. Run the installer to install the ACL for Windows client application.
5. Ensure that you install the **Non-Unicode** version.

The **ACL for Windows** shortcut appears on the Desktop when the installation is completed successfully.

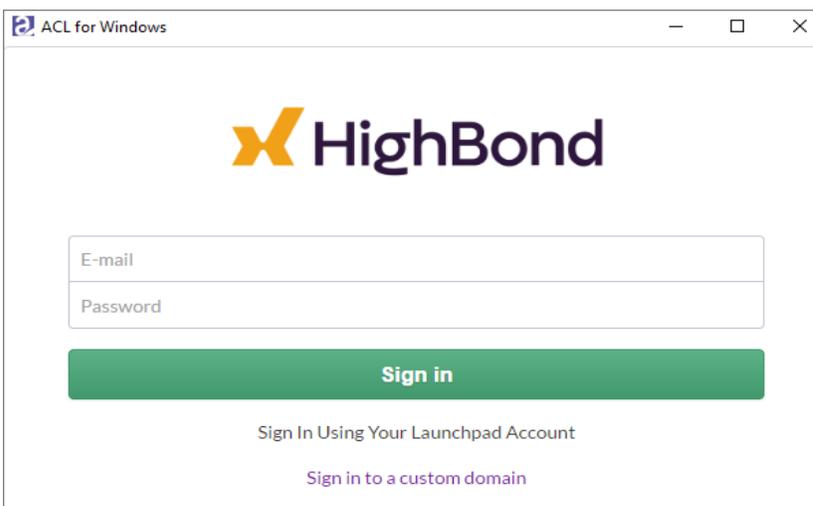
After installation, users must [activate ACL for Windows](#) for the first time before they can log in to the client.

For further information on installing and setting up ACL for Windows, refer to the *ACL for Windows Installation and Activation Guide* from the HighBond [Help Docs](#) page in the Galvanize Community Forum.

Activating ACL for Windows

After installation, users must activate the ACL for Windows desktop client before they can start using it. To activate ACL for Windows, perform the following:

1. Double-click the **ACL for Windows 14** shortcut. The Sign in page appears.



2. Click **Sign in to a custom domain** link available at the end of the page.

3. Enter your organization's custom domain in the field provided and click **Continue**.

Note: Contact Rsam Technical Support Team to obtain the custom domain for your organization, if you do not already have it.

The Rsam Sign In page appears.

4. Provide your Rsam credentials and click **Sign In**.
5. Make sure that your organization is selected in the drop-down list.
6. Click **Activate Analytics**.
On successful activation of the client, ACL for Windows opens.

Configuring the Rsam Data Source in ACL for Windows

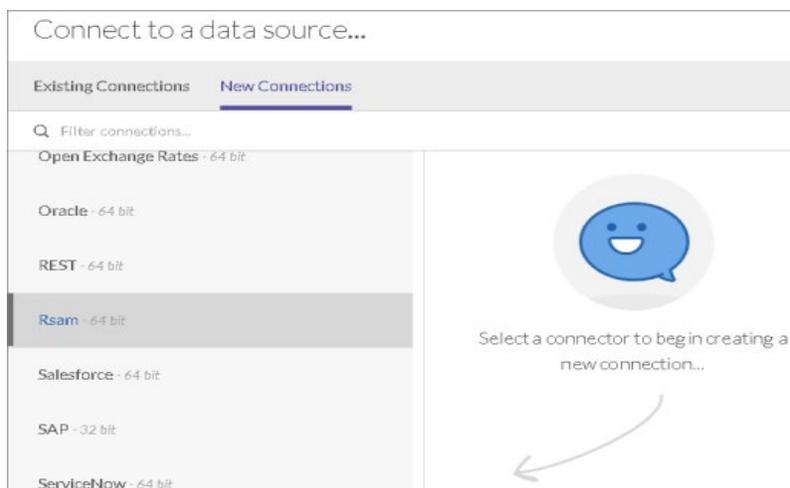
The Rsam Data Source for ACL for Windows must be set up in the client to enable the client to import data from the HighBond-enabled Rsam Saved Searches.

To set up the data source, the following information must be available for the paired Rsam instance:

- *URL* of the Rsam instance
- API key for the Rsam Inbound API user that will be used to query saved searches
- Rsam application name

To set up the data source, perform the following steps:

1. In ACL for Windows, in the **Create** section, click **Analytic Project**.
A dialog appears to save your project file.
2. Provide a name and save the project file.
3. The **Analytics** application opens.
4. Select **Import > Database and application**. The **Connect to a data source** dialog box appears.
5. Select **New Connections** and then select **Rsam** from the list of data sources available.



6. In the Data Connection Settings panel, provide the following information:

a. In the **Host** field, enter the URL of your Rsam instance.

Note: The URL provided here points to the Rsam instance from where you want to import Rsam Saved Searches, which is ideally your instance in production setup. You can also point it to a developer environment instance, if required.

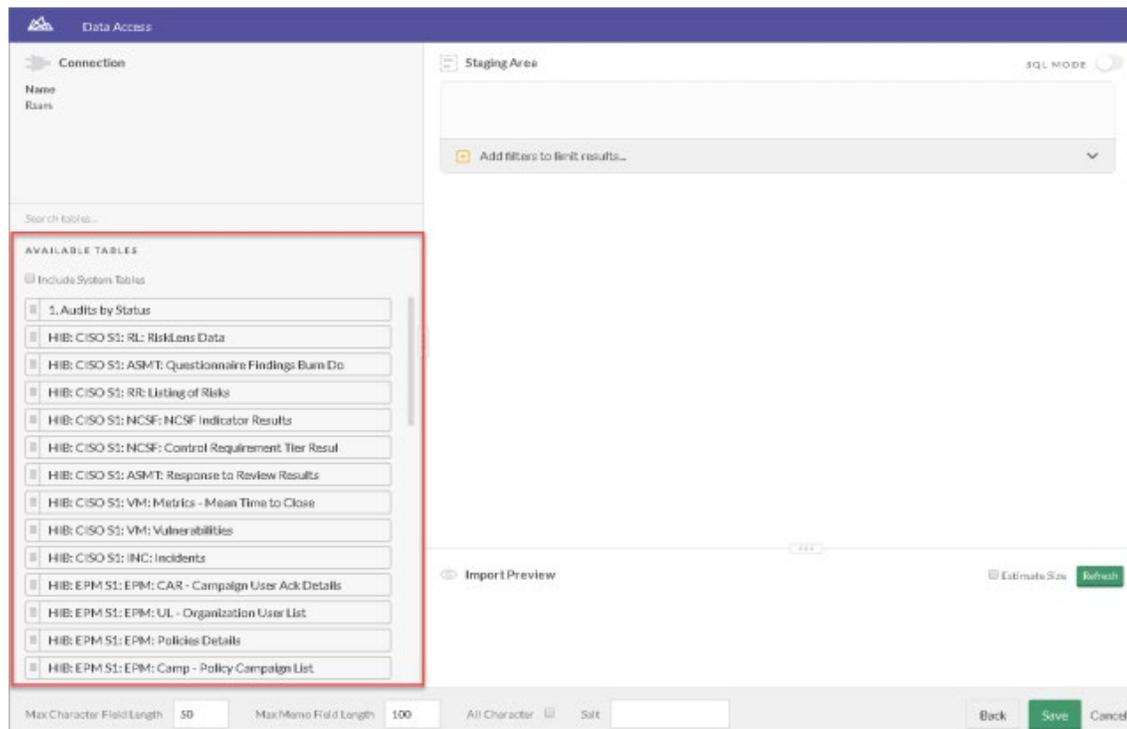
b. In the **Authentication Method** drop-down, select **API Key**.

c. Provide the API Key created (mentioned in the [Enabling Inbound API Access for Rsam Users](#) section).

Note: This user should have access enabled to Inbound API and to the HighBond enabled Rsam Saved Searches.

d. Click **Save and Connect**.

The Data Access window appears displaying all HighBond-enabled Rsam Saved Searches in the **Available Tables** section.



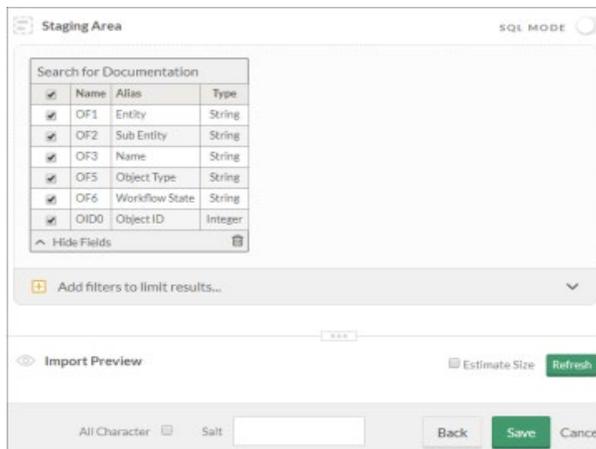
Note: When adding additional searches, you may need to clear the cache in ACL Analytics if the added search does not display. Go to the ACL for Windows top menu, click **Import > Database and Application**. In the **Connect to a data source** dialog box, find the connection and click  **> Clear Cache**.

Importing an Rsam Saved Search into ACL for Windows

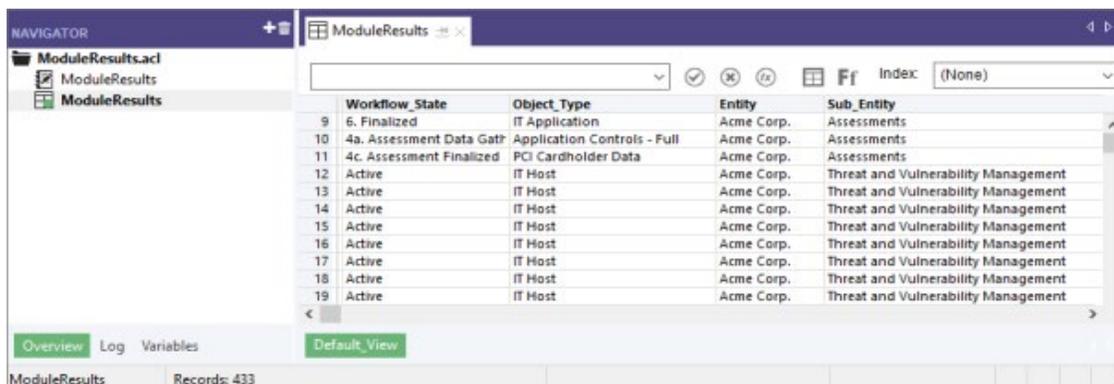
After configuring the Rsam data source in ACL for Windows, you can start importing HighBond-enabled Rsam Saved Searches into ACL for Windows.

To import an Rsam Saved Search into ACL for Windows, perform the following steps:

1. Sign in to ACL for Windows and select the required project.
The Project opens.
2. Select **Import > Database and application**.
3. In the **Connect to a data source** dialog, select the *Rsam Data Source* and click **Connect**. The Data Access window appears.
4. Select the required Rsam Saved Search from the **Available Tables** section. The Saved Search details appear in the **Staging Area**.



5. Click **Refresh** to fetch the latest results for the Saved Search.
The search results appear in the **Import Preview** section.
6. Click **Save** to save the imported saved search results.
7. Provide a name for the table in the prompt that appears and click **Save**.
The newly imported results table is listed in the *Analytics* window.



HighBond Access for Rsam Users

Customers can provide HighBond platform access to selected Rsam users. Your *ACL Robotics Enterprise* license includes up to one *ACL Robotics Professional user* for every licensed Rsam Administrator and up to one *ACL Robotics Oversight user* for every licensed Rsam Standard User. However, Rsam Administrators can determine which specific Rsam users have which level of access to the HighBond platform.

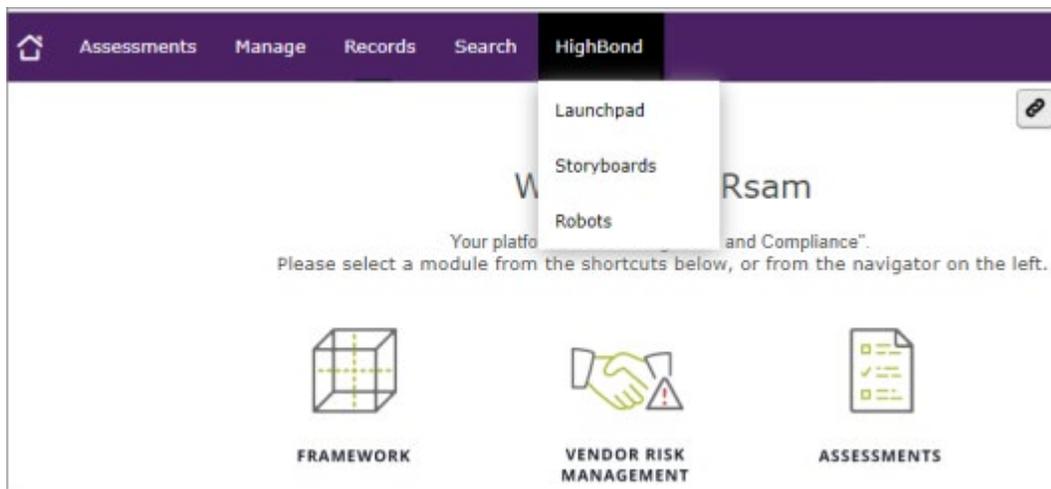
Rsam Administrators can control Rsam users' access to HighBond from within Rsam. They can administer HighBond access either individually per Rsam user or in bulk by leveraging Rsam **System Roles** and **User Groups**.

Note: When an Rsam Administrator grants access for Rsam users to HighBond, the users can log in to HighBond and view the designated areas. However, once the user sync process is executed and corresponding users have been created in HighBond, an Administrator must grant individual HighBond users access to specific Storyboards.

A scheduled task runs periodically to sync Rsam user settings with HighBond. As HighBond roles are added to, removed from, or modified for an Rsam user, those changes are reflected in the user's corresponding HighBond user account.

Note: User synchronization is unidirectional from Rsam to HighBond. So all changes to an Rsam user's HighBond access should be made from within Rsam. For example, if you modify a user's role in HighBond, that role will be overwritten by the role specified in Rsam, the next time the *user sync task* is executed.

Rsam users with access to HighBond will see the **HighBond** menu item in the top menu bar in Rsam, which allows them to leverage their current Rsam session to navigate and authenticate seamlessly from Rsam into HighBond. For more information on navigating to HighBond, refer to [Navigating to HighBond from Rsam](#).



This chapter explains the following topics:

- [Granting HighBond Access to Rsam Users in Bulk](#)
- [Granting HighBond Access to Rsam Users Individually](#)

Granting HighBond Access to Rsam Users in Bulk

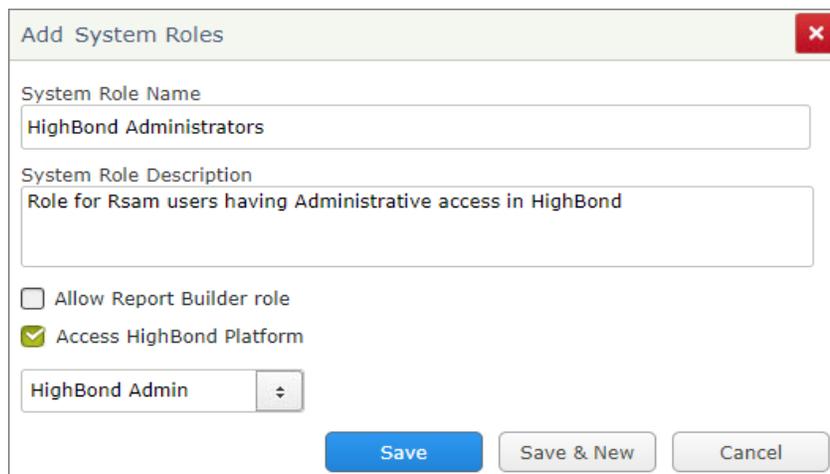
To assign HighBond access to Rsam users in bulk, an Rsam Administrator can create System Roles and then assign the roles to relevant user groups, which contain the required users. The steps are as follows:

1. [Creating HighBond System Roles](#)
2. [Associating a HighBond System Role with a User Group](#)

Creating HighBond System Roles

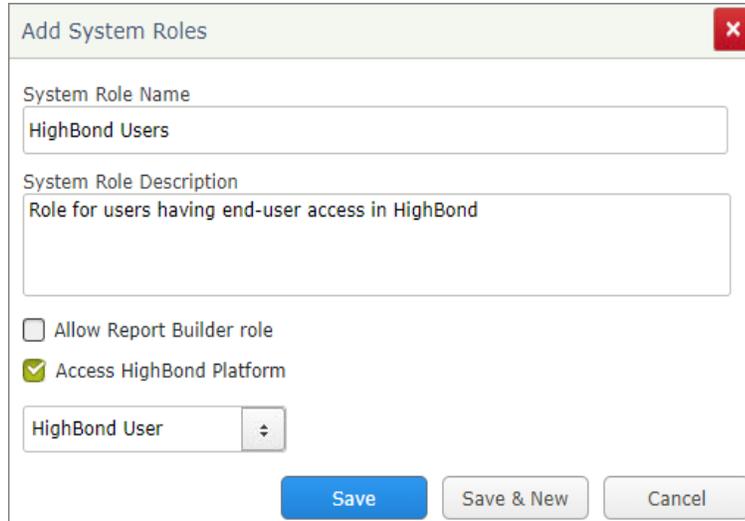
Rsam Administrators must create the system roles that can access HighBond. To create the system roles, perform the following steps:

1. Log in to Rsam as an *Administrator*.
2. Navigate to **Manage > Administration > Workflow > System Roles**.
3. Create the following two roles:
 - HighBond Administrators
 - HighBond Users
4. Configure the roles as follows:
 - For *HighBond Administrator*:
 - a. Select the **Access HighBond Platform** check box.
 - b. Select **HighBond Admin** from the drop-down list.

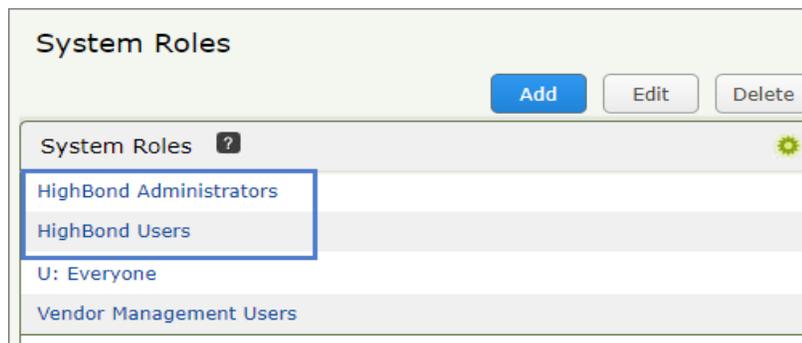


- c. Click **Save & New** to save the configuration and start creating the next role.

- For *HighBond User*:
 - a. Select the **Access HighBond Platform** check box.
 - b. Select **HighBond User** from the drop-down list.



- c. Click **Save** to save the configuration.
The roles are added to the list.

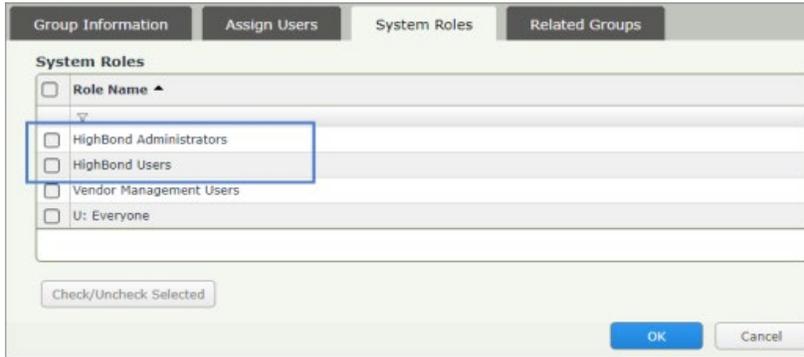


Associating a HighBond System Role with a User Group

To assign the HighBond access to users in bulk, you can assign the required system role to a User Group and all users part of the group will be granted access to HighBond. To assign the HighBond System Role to a user group, perform the following steps:

1. Navigate to **Manage > Users/Groups**.
2. Select the **Manage Groups** tab. The page refreshes to display all user groups available in the system.
3. Open the required user group.
4. Select **System Roles** tab.

5. Select the check box corresponding to the required HighBond role (HighBond Administrator or HighBond User).



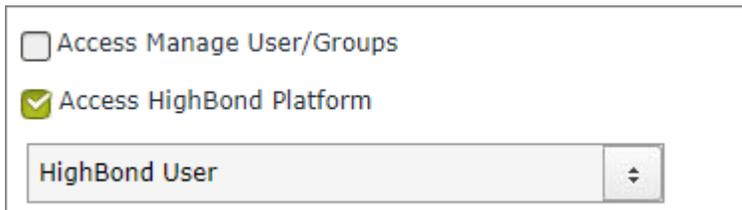
6. Click **OK** to save the configuration.

All users, who are members of the group, will be granted access to HighBond, based on the system role selected.

Granting HighBond Access to Rsam Users Individually

Access to HighBond can be provided to an Rsam user individually as well. To provide the access individually, perform the following steps:

1. Navigate to **Manage > Users/Groups**.
2. Open the required user record.
3. Select the **Access HighBond Platform** check box.
4. Select the required system role from the drop-down list. The values available are **HighBond User** and **HighBond Admin**.

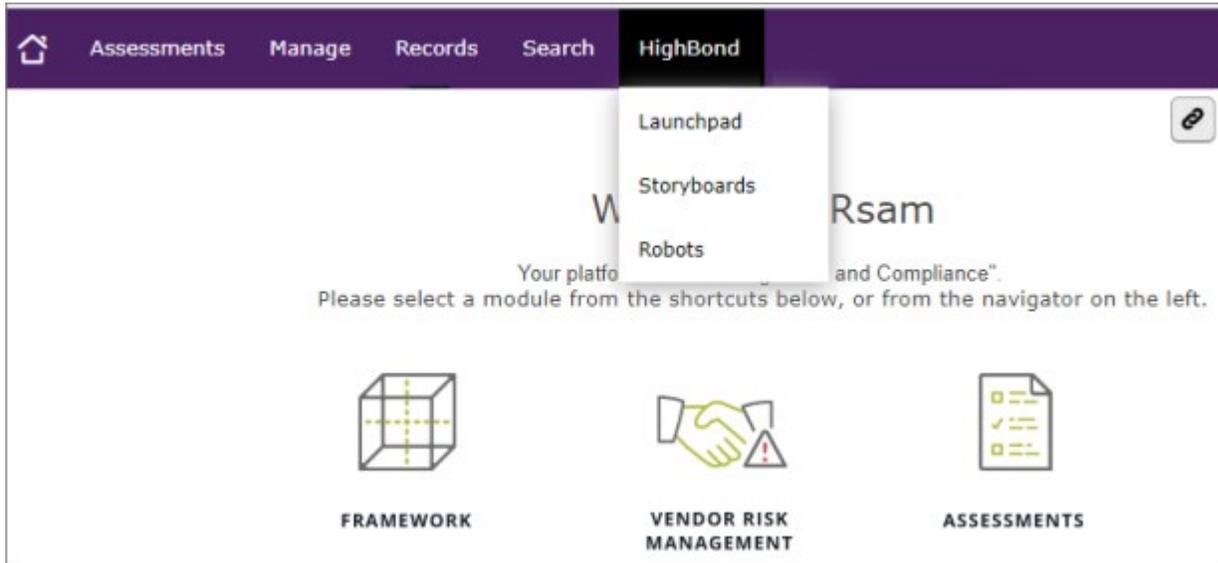


Note: User's Email ID and Last Name are mandatory attributes to access HighBond.

5. Click **OK** to save the configuration.

Navigation to HighBond from Rsam

Rsam users granted access to HighBond can navigate using the **HighBond** menu item provided on the top menu bar.



The navigation items available in the HighBond menu are as follows:

- **Launchpad** - Navigates to the HighBond Launchpad, a central location from which a user can access all areas of the HighBond platform.
- **Storyboards** - Navigates to the *HighBond Results* application, where users can view available Storyboards.
- **Robots** - Navigates to the *ACL Robotics* application, where a user can create and manage robots.

HighBond User Authentication Mechanism

When an Rsam user navigates to HighBond using the **HighBond** menu item in Rsam, Rsam passes a user token to automatically authenticate the user in HighBond. This makes navigation and authentication appear seamless to Rsam users.

Note: Rsam users can access HighBond only by navigating from the **HighBond** menu item in Rsam. Rsam user credentials are not stored in HighBond, so Rsam users cannot log into HighBond from the Launchpad login page.

Rsam Saved Searches for HighBond

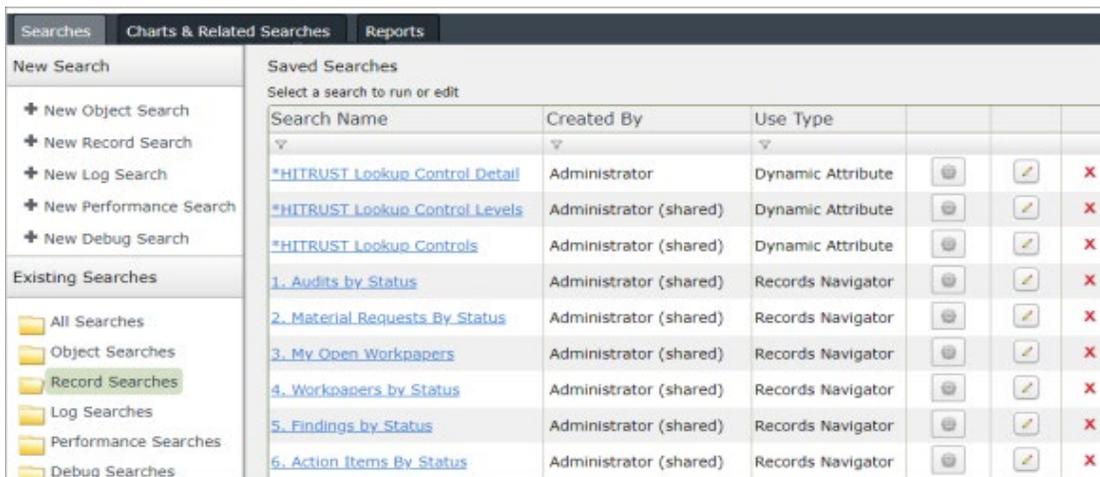
The Rsam integration with HighBond enables Rsam Saved Searches to be imported into HighBond and be displayed as visualizations in the Storyboards.

Note: Only those Saved Searches designated to be used with HighBond will be available to be imported into HighBond Storyboards.

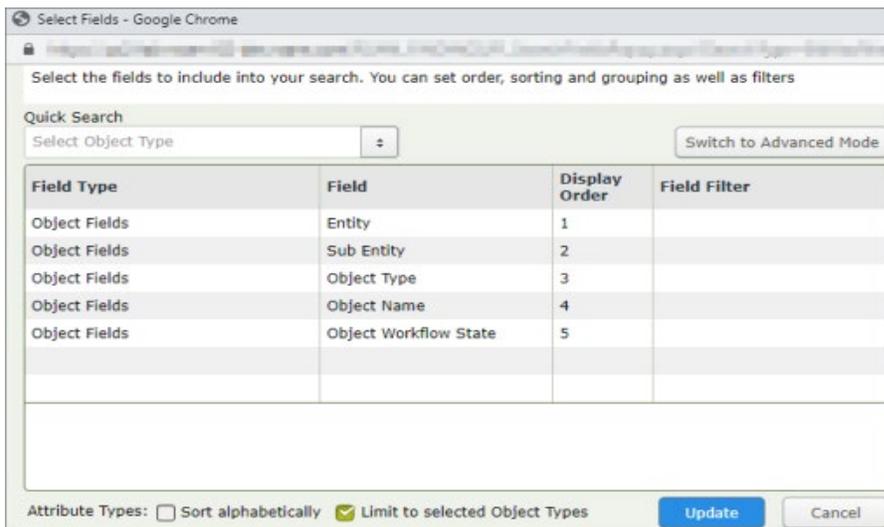
The Rsam data source that is configured with ACL for Windows allows you to bring Rsam object and record data into the HighBond Storyboards.

To designate an Rsam Saved Search to be used with HighBond, perform the following steps:

1. Log in to Rsam as a user with access to the required saved search.
2. Navigate to **Search > Saved Searches & Charts**.

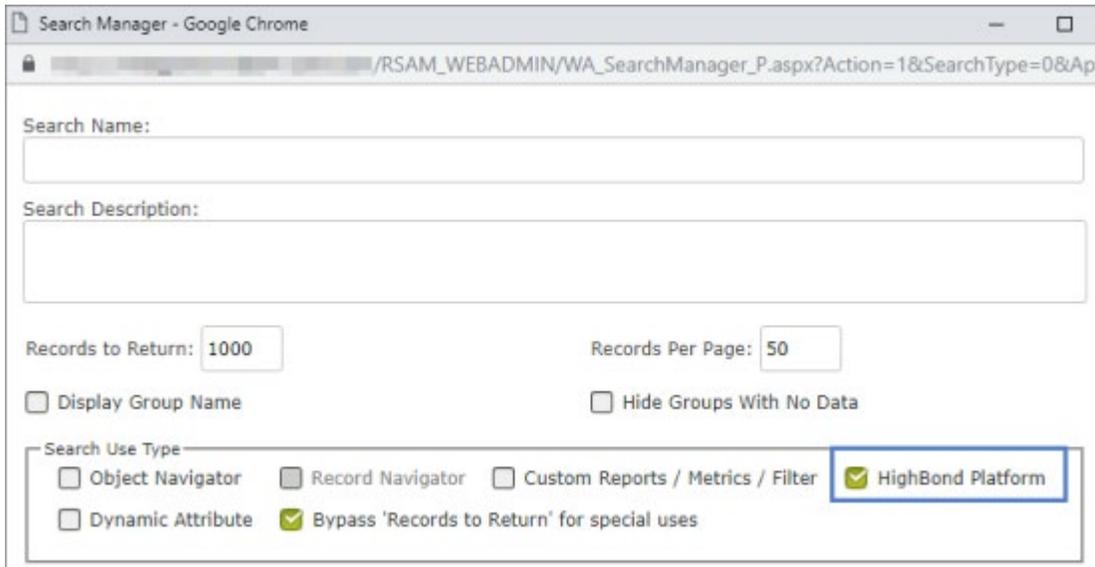


3. Click **+ New Object Search** and click **Update** in the **Select Fields** dialog box that appears.



The dialog box closes and the page refreshes to display the search results.

- Click **Save**.
The **Search Manager** dialog box appears.
- Provide the required details for the Search and select the check box corresponding to **HighBond Platform** in the **Search Use Type** section.



This option is available for Rsam Saved Searches only once the HighBond integration has been established in the Rsam instance.

- Click **Save** to save the search.
For information on using the HighBond-enabled Rsam Saved Searches, see [Importing an Rsam Saved Search into ACL for Windows Manually](#).

Guidance on Saved Searches for HighBond

Some points to remember when creating Saved Searches to be used in HighBond:

- Rsam recommends that searches used for HighBond integration be created solely for that purpose.
If you want to use an existing saved search, it is recommended that you use the **Save Search As** feature to create a copy of that search for use in HighBond. This ensures that users do not make modifications to the search that may break the HighBond analytic scripts created to process the specific search result.
- If a saved search is intentionally being changed to modify the data sent to HighBond, the corresponding changes will need to be made in the respective HighBond scripts (whether those scripts are being executed through the client application or HighBond *Robots*).
- HighBond expects a *flat* search result. So Saved Searches created for use in HighBond should not have any groupings specified. If data needs to be grouped in the resulting storyboard, this grouping can be accomplished using HighBond analytic scripts.

Importing and Exporting Rsam Saved Searches in ACL for Windows

ACL for Windows is a desktop client that serves two primary purposes when creating Rsam Storyboards:

- Serves as a user interface for manually connecting to an Rsam instance, importing a Saved Search result, and publishing that result to HighBond.
- Can be used as a local development environment for creating and testing analytic scripts that can be automated using robots. For more information, refer to the *Automating Storyboards with Robots* document.

For information on installing and activating ACL for Windows and configuring Rsam data source, refer to the *Rsam Integration with HighBond Guide*.

Importing an Rsam Saved Search into ACL for Windows

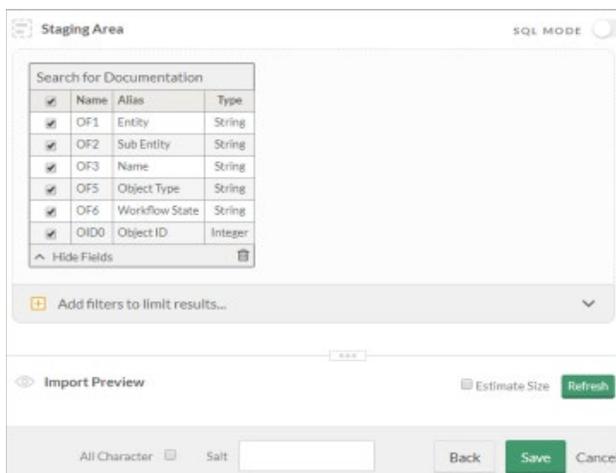
After configuring the Rsam data source in ACL for Windows, you can start importing HighBond-enabled Rsam Saved Searches into ACL for Windows.

To import an Rsam Saved Search into ACL for Windows, perform the following steps:

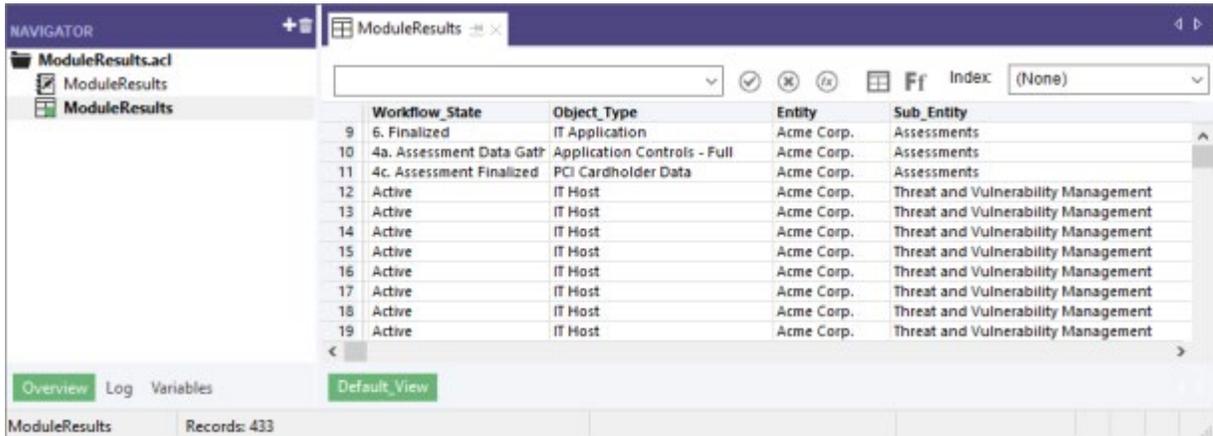
1. Sign in to ACL for Windows and select the required project.
The Project opens.
2. Select **Import > Database and application**.
3. In the **Connect to a data source** dialog, select the *Rsam data source* and click **Connect**.
The Data Access window appears.

Note: If you want to refresh the connection, move the cursor over the Rsam data source and click  and select **Clear cache**.

4. Select the required Rsam Saved Search from the **Available Tables** section. The Saved Search details appear in the **Staging Area**.



5. Click **Refresh** to fetch the latest results for the Saved Search. The search results appear in the **Import Preview** section.
6. Click **Save** to save the imported saved search results.
7. Provide a name for the table in the prompt that appears and click **Save**. The newly imported results table is listed in the *Analytics* window.

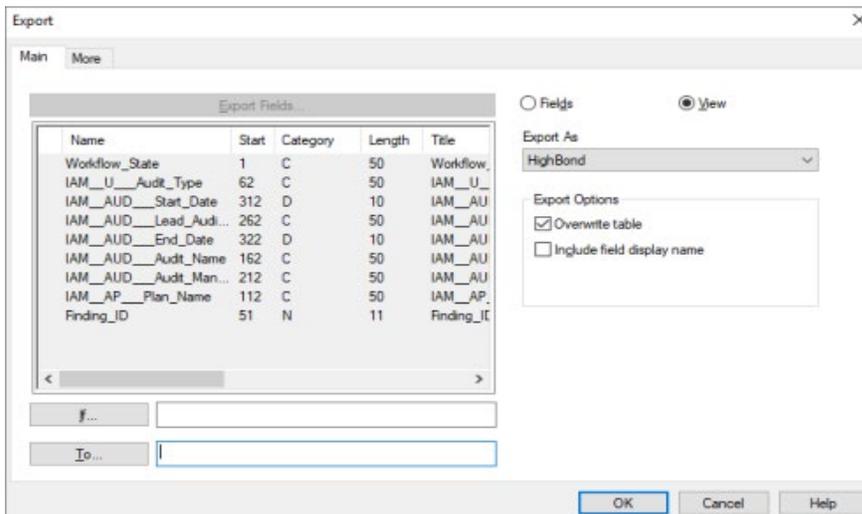


Exporting an Rsam Saved Search from ACL for Windows to HighBond Results

After importing an Rsam Saved Search into ACL for Windows, you can manually export the search into the HighBond *Results* on-demand basis.

To export an Rsam Saved Search from *ACL for Windows* to HighBond *Results*, perform the following steps:

1. In the Analytics window, select the required Rsam Saved Search results from the **Navigator** panel.
2. Select **Data > Export**. The **Export** dialog box appears.



3. Select **Fields** or **View** as required.
If you select Fields, select all the required fields to be exported by click **Export Fields**.
4. Select **HighBond** from the **Export As** drop-down list.
5. Select the check box corresponding to **Overwrite table** if you want the data to be overwritten for any existing fields.
6. Click **To**. The **Select Destination Test** dialog box appears.
7. Select your organization's account and then select the collection **My Sample Collection**.

Note: Customers can create additional Collections in HighBond and those collections will be available for selection from within ACL for Windows.

8. Select **My Sample Analysis**.
9. Provide a name for the search in the **New data analytic** field and click **Create**.
The Test ID is automatically populated.
10. Click **OK** in the **Export** dialog box. The results are exported to the destination successfully.

Note: The import and export of Rsam saved searches can be automated using HighBond Robots. For more information, refer to the *Rsam HighBond Integration Guide Part 3 - Automating Storyboards with Robots*.

Configurations in HighBond

On successfully exporting Rsam Saved Searches into HighBond, the search results will be available in the designated **Collection** in the *Results* module. Users can use these results to create visualizations, which can in turn be used to create storyboards.

This chapter explains the following topics:

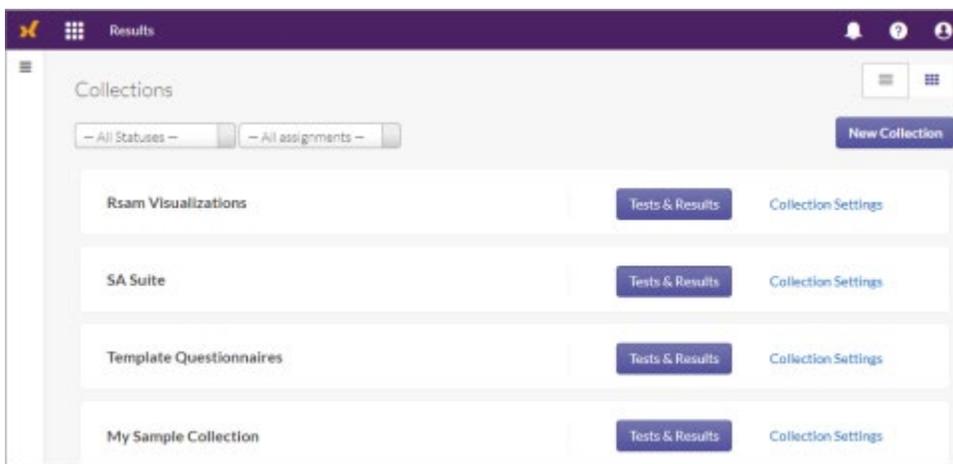
- [Creating Visualizations from Search Results](#)
- [Creating a Storyboard from Visualization](#)
- [Granting Rsam Users Access to Storyboards](#)

Creating Visualizations from Search Results

To create visualizations from Rsam search results, perform the following steps:

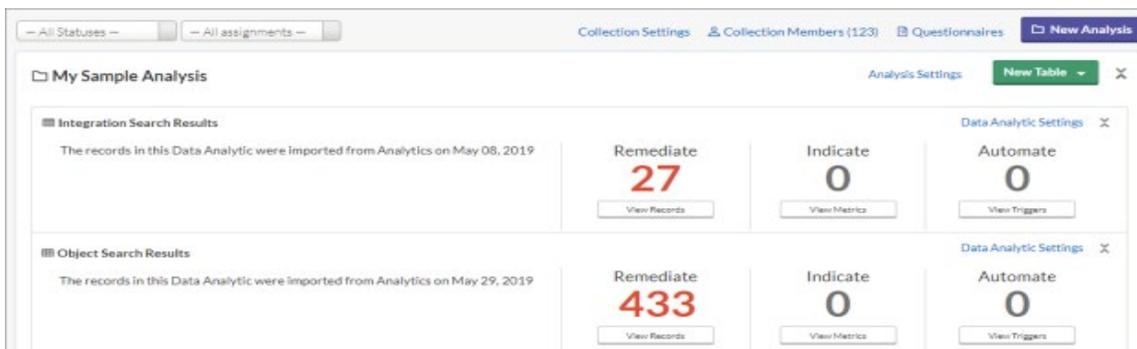
1. Log in to Rsam and navigate to **HighBond > Storyboards**.

The **Results Dashboard** appears to display the **Storyboards** and **Collections**.



2. Scroll down to the **Collections** section and click **Tests & Results** corresponding to the collection where the [search was exported](#) (My Sample Collection) from ACL for Windows.

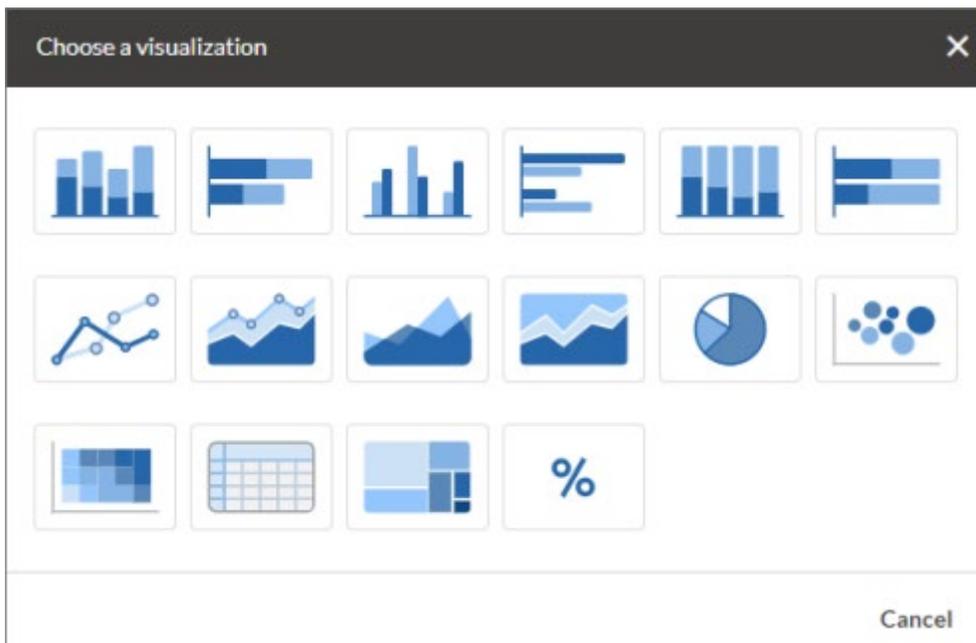
The page refreshes to display the Data Analytic results available in the selected collection.



- Click **View Records** corresponding to the Data Analytic you exported from ACL for Windows. The **Table View** appears listing all the results.

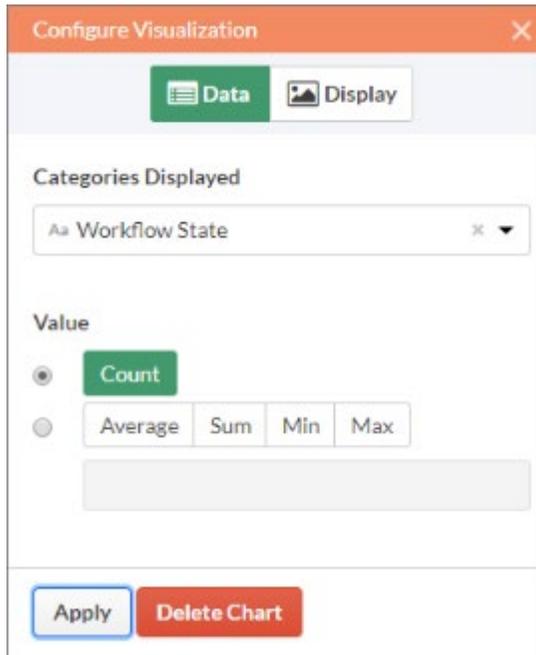
Table View		+ Add Visualization		Object Search Results		433 Records		Save	...	≡	▼
		Aa Priority ▼	Aa Sta... ▼	🕒 Published ▼	Aa Publi... ▼	🕒 Updated ▼	🕒 Clo... ▼	Aa Workflow St... ▼	#	Object ID	
1	<input type="checkbox"/>	Low	New	May 29, 2019 12:38:51 PM	Administrator	May 29, 2019 12:38:51 PM		N/A	869		
2	<input type="checkbox"/>	Low	New	May 29, 2019 12:38:51 PM	Administrator	May 29, 2019 12:38:51 PM		N/A	1,608		
3	<input type="checkbox"/>	Low	New	May 29, 2019 12:38:51 PM	Administrator	May 29, 2019 12:38:51 PM		6. Finalized	1,609		
4	<input type="checkbox"/>	Low	New	May 29, 2019 12:38:51 PM	Administrator	May 29, 2019 12:38:51 PM		1. Not Started	1,610		
5	<input type="checkbox"/>	Low	New	May 29, 2019 12:38:51 PM	Administrator	May 29, 2019 12:38:51 PM		1. Not Started	1,690		
6	<input type="checkbox"/>	Low	New	May 29, 2019 12:38:51 PM	Administrator	May 29, 2019 12:38:51 PM		1. Not Started	1,691		
7	<input type="checkbox"/>	Low	New	May 29, 2019 12:38:51 PM	Administrator	May 29, 2019 12:38:51 PM		Active	1,693		

- Click **+Add Visualization** to create a visualization from the search results. The **Choose a visualization** dialog box appears.

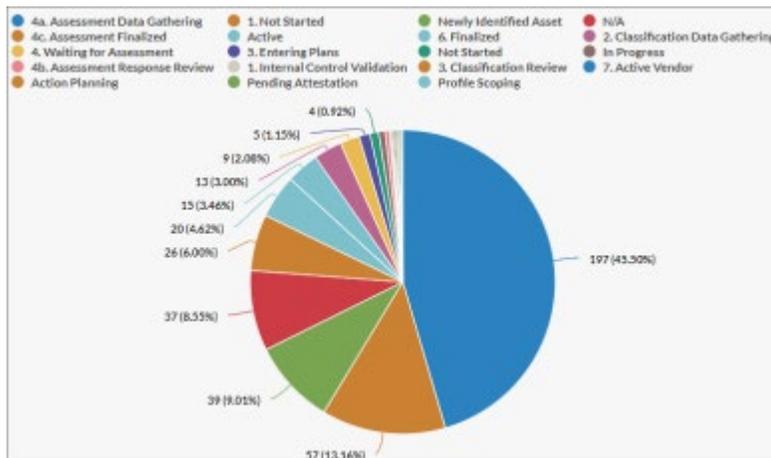


- Select the required visualization type (for example, pie chart, heat map, column chart, summary table, etc.).

6. In the **Configure Visualization** panel, perform the following steps:
 - a. Select the required category (for example, *Workflow State*) to be displayed in the visualization, from the **Categories Displayed** drop-down list.
 - b. Select the **Value** type to be displayed in the visualization.

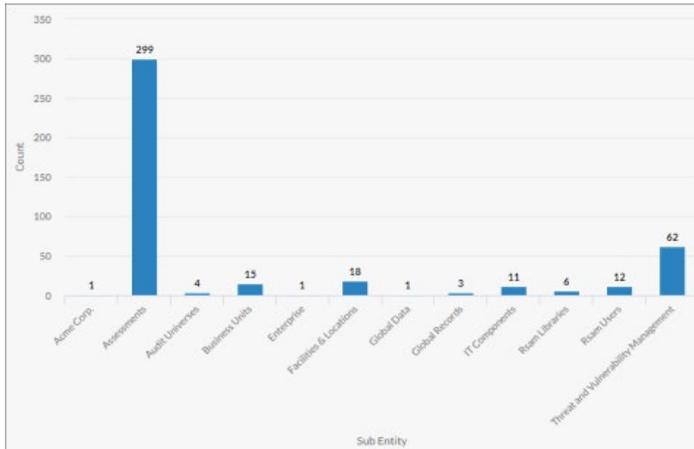


- c. Click **Apply** to preview the visualization.



7. Provide a name for the visualization and click **Save**.
8. Click **+** to create one more visualization.
9. Select the required visualization type (for example, Column chart).
10. Select **Sub Entity** in the **X-Axis** field.
11. Select **Count** in the **Y-Axis** section.

12. Click **Apply** to create the visualization.



13. Provide a name for the visualization and click **Save**.

Creating a Storyboard from Visualization

To create a storyboard using the visualizations, perform the following steps:

1. Navigate to the **Results Dashboard** and click **New Storyboard**.

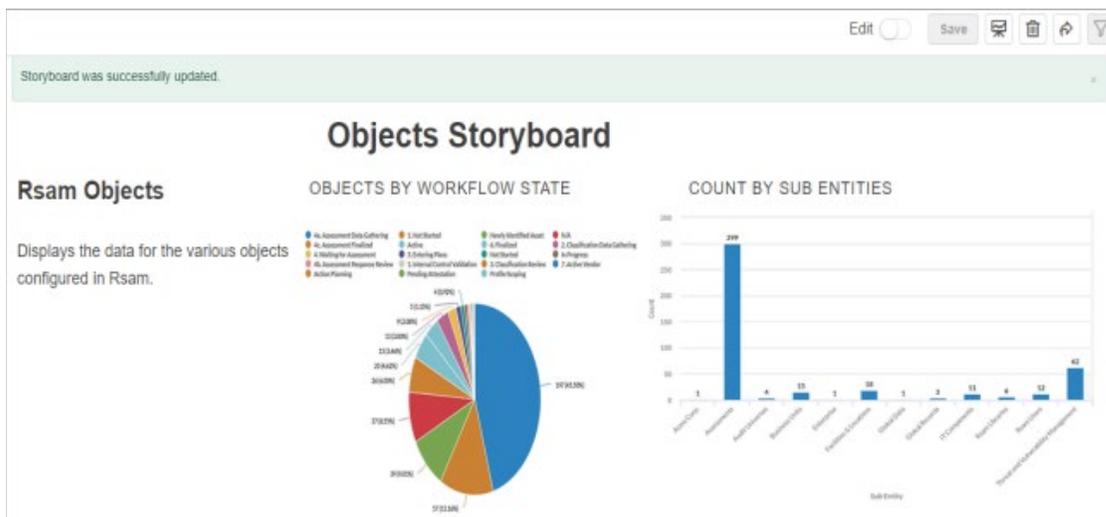
The storyboard creation page appears.

2. Click  to add visualizations, metrics, and charts.

3. Click  to add the newly created visualizations.

4. After adding all the required elements on the storyboard, click **Save**.

5. Click the **Edit** toggle button to view the created storyboard.



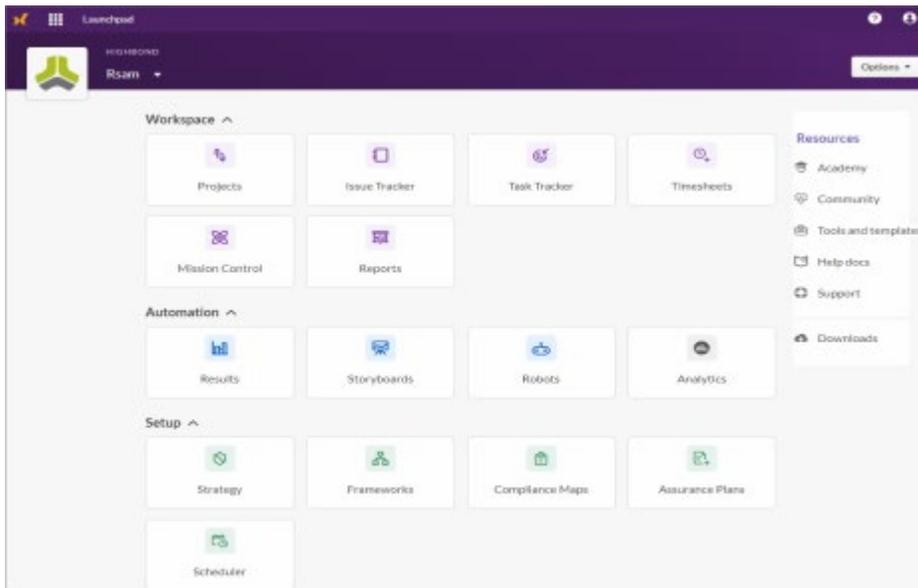
Granting Rsam Users Access to Storyboards

After confirming that Rsam data is being pulled into the Storyboard successfully, you can grant users access to the Storyboard. Rsam Administrators determine which Rsam users have access to HighBond in general. However, once the user sync process is executed and corresponding users have been created in HighBond, an Administrator must grant individual HighBond users access to specific Storyboards.

To grant users access to a storyboard, perform the following steps:

1. Log in as an *Rsam Administrator* and navigate to **HighBond > Launchpad**.

The HighBond Launchpad appears.



2. Click **Automation > Storyboards** to open the list of storyboards.
3. Select the required storyboard. The page refreshes to display the storyboard.
4. Click the **Share Storyboard** () icon on the top-right of the storyboard. The **Storyboard Sharing** panel displays the list of users having access to the storyboard.
5. Scroll to the end of the panel and click **Manage Users**.
6. Use the search filter to find the user(s) you want to grant access to the storyboard. You can perform multiple searches to select multiple users in this filter.
7. Select the required user(s) and click **Confirm Changes**. The selected users are now granted access to the storyboard.