



Rsam Platform

Step-by-Step Tutorial - End User Basics

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Concepts Used in this Tutorial

This section provides a brief overview of Rsam concepts mentioned in this tutorial.

User Account – A user account allows a user to access Rsam with specified credentials and right permissions.

Role – A role defines the functionality and data available to an authenticated user.

Objects – Objects are structures that contain questionnaires and records.

Record Category Type – The Record Category Type is the highest grouping in the Rsam Record structure. Categories represent the various uses for Records within the organization. A category can include several different Record Types.

Record Type – Records Types are the essential building blocks of record-based applications. They store data (i.e. attribute values) and are subject to workflow. Record Types can be arranged in a hierarchical structure, starting from a “Root” Record Type and branching into “Child” Record Types. Every Record Type must belong to a Record Category Type, and every Record Category Type must belong to an Object Type.

Saved Search – Rsam’s Search functionality allows you to search for and manage objects, records, and logs using advanced features such as grouping, filtering, charting, and exporting. Saved Searches have multiple uses throughout Rsam. They are used to create Rsam “navigators,” which can then be presented to users via Home Page tabs. They can also be presented as charts or as saved search links on home page tabs. They define saved search attributes that establish links between Rsam objects and records, and can be shared with individuals or roles as stand-alone lookup and navigation tools.

Chart – The Charting functionality in Rsam is powerful and dynamic. Charts are tightly integrated with Rsam searches and can be created and modified directly from within search results. The resulting charts can then be exported for use in external documents or included as widgets on home page tabs to create powerful in-application dashboards.

Pre-Existing Configurations Used in this Tutorial

To ensure that each platform tutorial can be executed in isolation (i.e. with no dependency on having executed other tutorials), your Rsam sandbox environment has been pre-configured with certain administrative items. This tutorial utilizes the following pre-existing configurations.

Configuration Type	Admin Name	Use
Object	10.2.57.255	Object in Open All Record Categories.
	Acme Corp HQ	Object in Open a Specific Record Category.
	FinanceBooks	Object in Assigning Roles to User Accounts.
Record Category	Findings from Questionnaire	Record category in Open a Specific Record Category.
Home Page Tab	Questionnaire Findings Navigator	Record navigator in Filter and Copy a Link.
	Findings Navigator	Record navigator in Add a Child Record.
	Start	Home page in Add a New Record.
Record Type "Finding from Questionnaire"	Password Length (user)	Record in the following sections: <ul style="list-style-type: none"> - Open a Record - Update a Record - Perform a Workflow Action - Assign a Record
Object	ASMT Test	Object in the following sections: <ul style="list-style-type: none"> - Open a Record - Assign a Record - Filter - Perform a Workflow Action
Search	Audits by Status	Record search in the following sections: <ul style="list-style-type: none"> - Open a Saved Search

Configuration Type	Admin Name	Use
		- Update an Existing Saved Search
	Findings by Status	Record search in the following sections: - Add a Chart - Update a Chart
User	r_test_user	User in Assigning Roles to User Accounts.
	r_admin	User in the following sections: - Interact with Record Categories - Interact with Records - Interact with Searches and Charts
	r_risk_owner	User in Set up Login Account Email Address.
	r_assessment_manager	User in Open an Assessment and Create an Assessment.
	r_demo_owner	User in Assign a Record.

Note: If you are using your own instance of Rsam instead of an Rsam sandbox environment, you must ensure that your environment includes examples of the above configuration types.

Tutorial Objectives

In this tutorial, we will complete the following tasks:

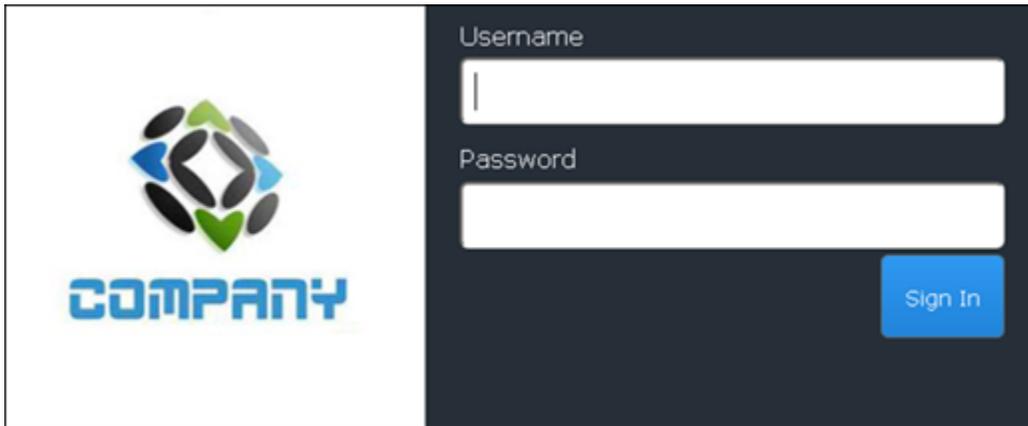
- Get familiar with Rsam's sign-in procedure and understand user accounts and roles.
- Navigating in Rsam.
- Open and create assessments.
- Open and view record categories.
- Perform record-specific tasks, such as opening records, adding records, adding child records, updating records, copying record links, performing workflow actions, assigning records, and deleting records.
- Explore searches and charts.

User Login and Permissions

This section explains the basics of users, roles, and permissions in Rsam that are required to access user accounts and perform tasks.

Sign-In Page

Tutorials leverage pre-defined accounts that require authentication. Because tutorials may require you to utilize multiple user accounts, manual authentication is required through the default sign-in screen that opens when you access the secure URL.



Like most elements in Rsam, the Sign In page can be configured in a number of ways. Different authentication options, such as user self-registration, integration with customer user directories (such as Active Directory), or integration with Single Sign-On products can be applied. In addition, you can embed your own branding and logo on the Sign In page.

Sign in to your Sandbox

To sign in to your Rsam sandbox, perform the following steps:

1. Obtain the URL for your Rsam sandbox and your user account credentials.
2. Open a web browser, such as Google Chrome, Microsoft Internet Explorer, or Mozilla Firefox.
3. Type the URL in the address bar of the web browser.
4. Enter Username and Password.
5. Click **Sign In**.
6. If you are prompted to change the password, specify a new password.

User Accounts

For a user to log in to Rsam, the correct username and password must be provided. These credentials validate the user account in Rsam and provides the user with the appropriate permissions in the application. The default password for all accounts in the Rsam sandbox is password. Individual users

may change their password once authenticated. Users with administrator permissions may also reset the password of other users.

Set up Login Account Email Address

An Rsam sandbox environment is configured to send automated email notifications. In a production implementation, user email addresses are usually imported from LDAP or other directory services. In the sandbox, email addresses can be manually updated for testing purposes. In this example, we will update the email address of the `r_risk_owner` user.

To update the email address, perform the following steps:

1. Sign in to Rsam as the `r_admin` user; where `Username` is `r_admin` and `Password` is `password`.
2. Navigate to **Manage > Users/Groups**.
3. On the **Manage Users** tab, locate the `r_risk_owner` user and double-click the user to open the details.
4. Enter the desired email address in the `eMail ID` field, and click **OK**.

User Details

User Id:

First Name: Middle Name: Last Name:

eMail ID: Phone Number:

Assigning Roles to User Accounts

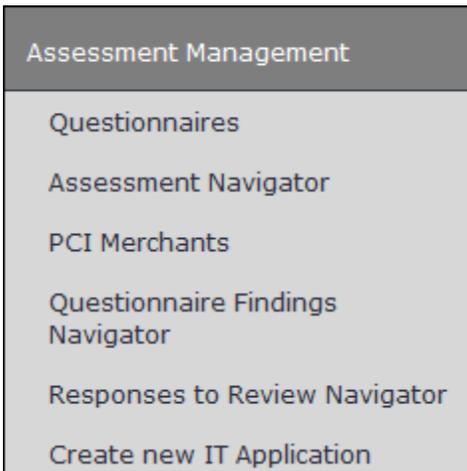
Most Rsam functionalities are role-based, and the linkage between a user account and role is made in the context of either an object (such as organization, location, assessment, or host) or record (such as an incident, threat, or finding).

For example, if the user “`r_assessment_manager`” is assigned the role of “Manager” on the application object “FinanceBooks”, then in the context of that particular object, the user will have all the functionalities that have been defined for the “Manager” role. If that user has not been granted any roles for other objects, then the user won’t have access to or see a reference to the other objects.

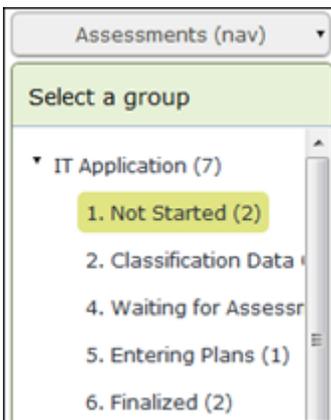
Rsam offers many methods for creating the linkage between user accounts and roles. Roles can be directly assigned to an individual user account or to a group of users. Roles can also be assigned through attributes or the Permission Assignments screen on individual objects and records. Roles can also be assigned to different levels of object hierarchies, such as an Entity, Sub-Entity, Object, or Aspect.

In this example, we will assign the `r_test_user`, the Respondent role, to the “FinanceBooks” object. To assign the role, perform the following steps:

1. Sign in to Rsam as the `r_admin` user. Enter **Username** as `r_admin` and **Password** as `password`.
2. From the navigation panel, navigate to **Assessment Management > Assessment Navigator**.



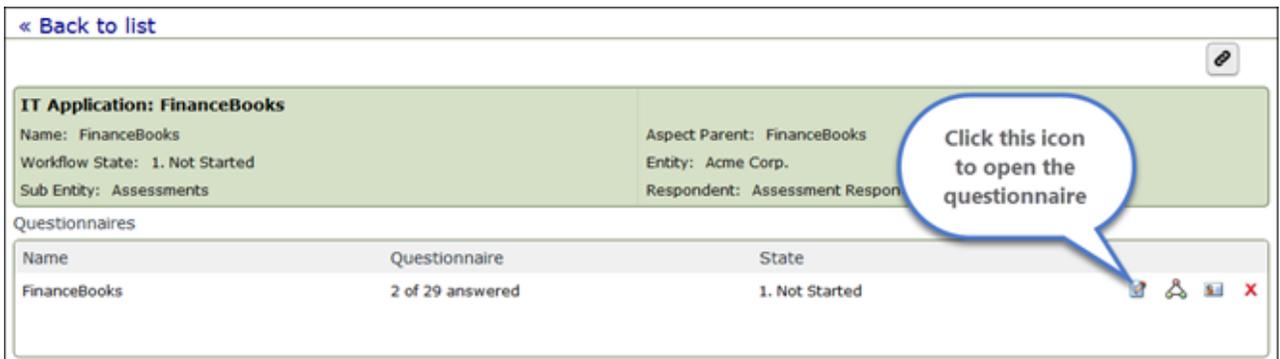
3. Click the expand icon corresponding to IT Application to expand it, and then click the **1. Not Started** sub-grouping to display the objects within that sub-grouping.



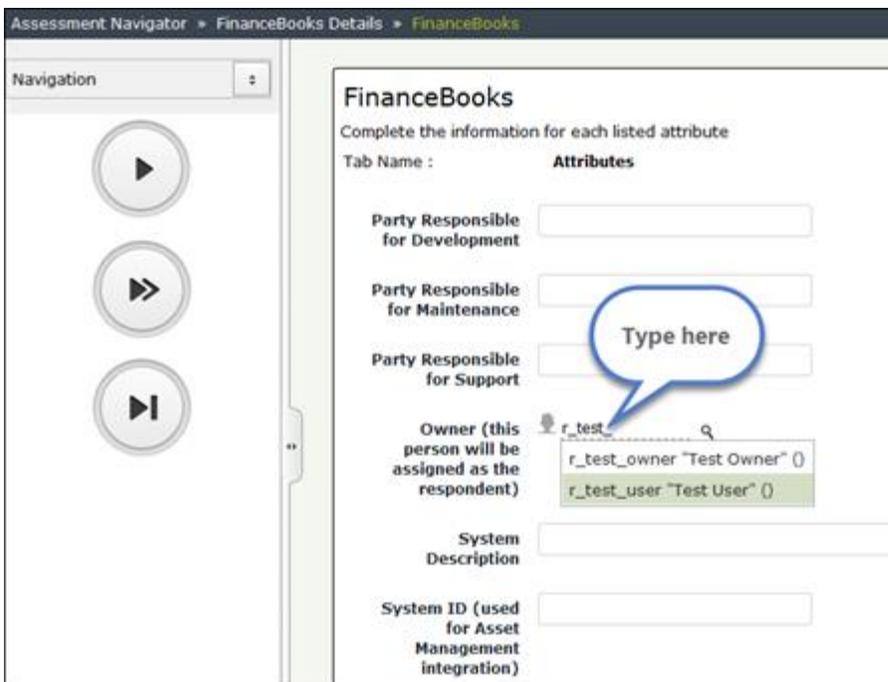
4. Locate the “FinanceBooks” object and double-click to open the details.

Search									
		Refresh	Add ▾	Open	Delete	Assign...	Action ▾		
Name	Aspect	Parent	Entity	Sub Entity	Respondent				
<input type="checkbox"/>	FinanceBooks	FinanceBooks	Acme Corp.	Assessments	Assessment				
<input type="checkbox"/>	Paligo	Paligo	Acme Corp.	Assessments					

5. In the **Questionnaires** widget, click the icon to open the questionnaire.



- In the questionnaire that opens, type r_test_user in the Owner (this person will be assigned as the respondent) attribute. As you type, the list of users that match the string appears. From the list, select r_test_user "Test User" ().



The user is assigned.

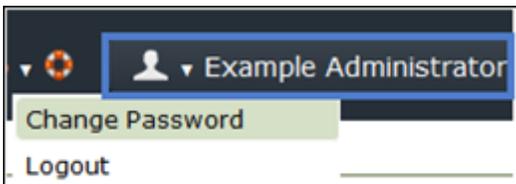
- Click  to reach the end of questionnaire and click **Start Classification**.
- Mouse hover over your username and click **Logout** to log out from Rsam.
- Sign in as the Test User user. Enter **Username** as r_test_user and **Password** as password.
- From within the navigation panel on the left side, navigate to **Assessment Management > Assessment Navigator**.
- From within the navigator, select the IT Application grouping. The "FinanceBooks" object should be included in this list. This is because the Respondent role has been assigned to the "r_test_user" user.

Note: The IT Application grouping tab will be visible for r_test_user only if the user is assigned permission to view the tab. For information on assigning permissions to a tab, refer the document Rsam Platform Step-by-Step Tutorial – Creating a Home Page.

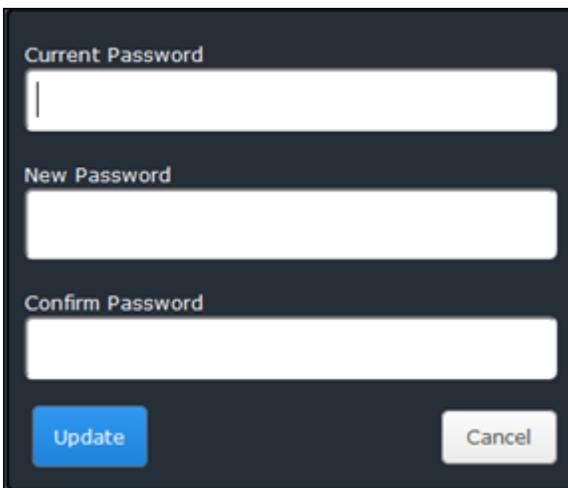
Change Password

You may change your Rsam user account password anytime as desired. To change the password, perform the following steps:

1. Mouse hover over your username and select **Change Password**.



2. Enter your existing password in the **Current Password** field.
3. Type a new password in the **New Password** field and retype the new password in the **Confirm Password** field.

A screenshot of a password change form. It features three input fields: 'Current Password', 'New Password', and 'Confirm Password'. Below the fields are two buttons: a blue 'Update' button and a grey 'Cancel' button.

4. Click **Update**.

Navigating in the Rsam Sandbox

This section provides an overview of navigating in Rsam through Menu options, home page, and other tabs in the Navigation panel.

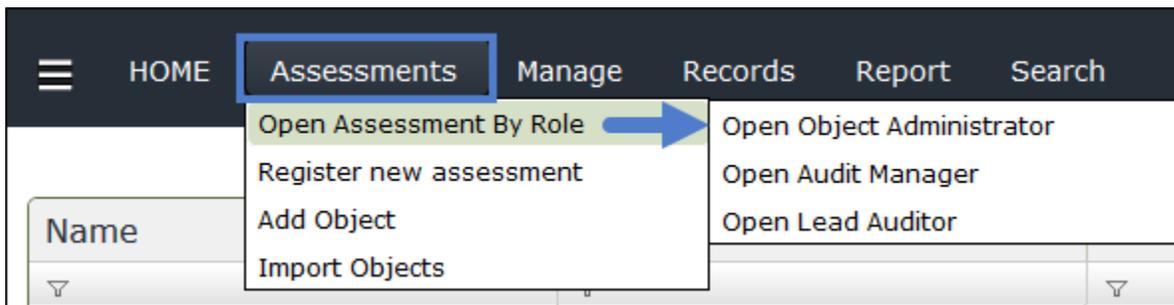
Menu Bar

The menu bar in Rsam consists of two sections: the application menu and the user menu. The application menu is on the left, and the user menu is on the right. The application and user menus are controlled by roles, so different users could have different items available in their respective menus.

The following image illustrates the menu items available for the `r_admin` user:

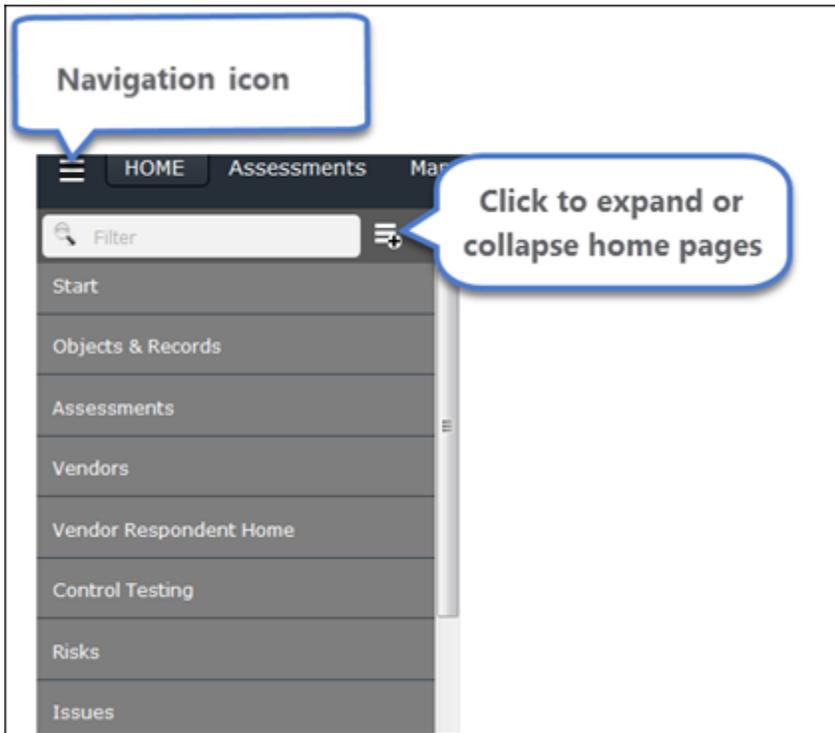


Hovering over a menu item displays sub-menu items.

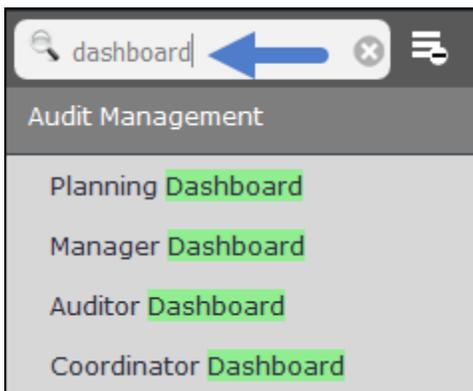


Navigation Panel

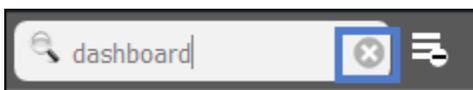
Rsam's main navigation panel is presented on the left side of the screen. This navigation panel contains links to Home Page tabs. The navigation panel icon (☰) at the top-left corner on the Menu bar allows you to expand and collapse the navigation panel. If the navigation panel is expanded, clicking the navigation icon collapses the navigation panel. To re-expand the navigation panel, click the navigation icon again. After navigating to other pages in Rsam, clicking on "Home" link in the menu bar will direct you to the most recently visited Home Page tab. If the last visited page was a self-registered link, it may not open that page.



The Filter field in the navigation panel allows you to search for a specific home page. For example, if you want to search for all home pages that include “dashboard” in their name, type “dashboard” in the search box. The home pages that match the filter string are presented, and the matched text is highlighted.



To delete the filter criteria, click the  icon.



Home Page Tabs

Home Page tabs are pre-defined pages that allow users to quickly access the most common items they interact with in Rsam. Home Page tabs are hierarchical. Each top-level Home Page tab or "grouping" tab can contain one or more "grouped" tabs.

Access to home page tabs is role-based, so users can view only those Rsam Home Pages that are associated with their roles.

To view a Home Page tab, perform the following steps:

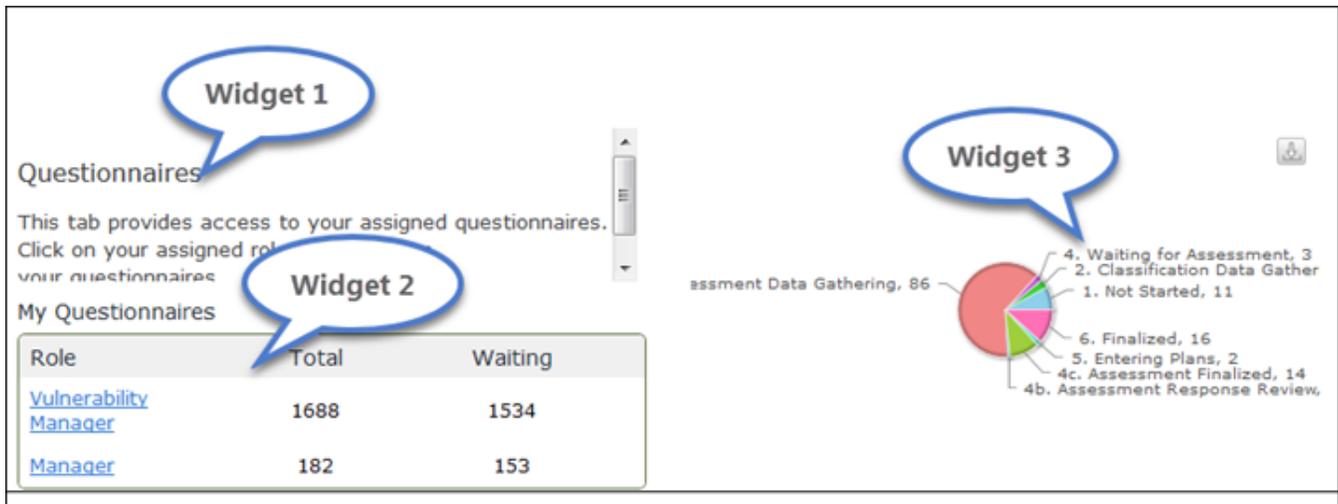
1. Ensure that the left-hand-side navigator panel is visible. If it is not, use the navigation drawer icon to expand it.
2. In the navigation panel, click any of the Home Page tab grouping tabs to display its subtabs, then click on the name of the grouped Home Page tab that you would like to view.

Home Page Tab Types

Home Page tabs come in three different types: Standard Tabs, Record Navigator Tabs, and Object Navigator Tabs.

Standard Tab

A Home Page created using the Standard Tab displays "widgets," which include items like dashboard charts, reports, self-registration links, and more.



The screenshot displays a user interface for a 'Questionnaires' tab. It features three callout boxes labeled 'Widget 1', 'Widget 2', and 'Widget 3'. Widget 1 points to the 'Questionnaires' header. Widget 2 points to a table titled 'My Questionnaires'. Widget 3 points to a pie chart showing assessment data.

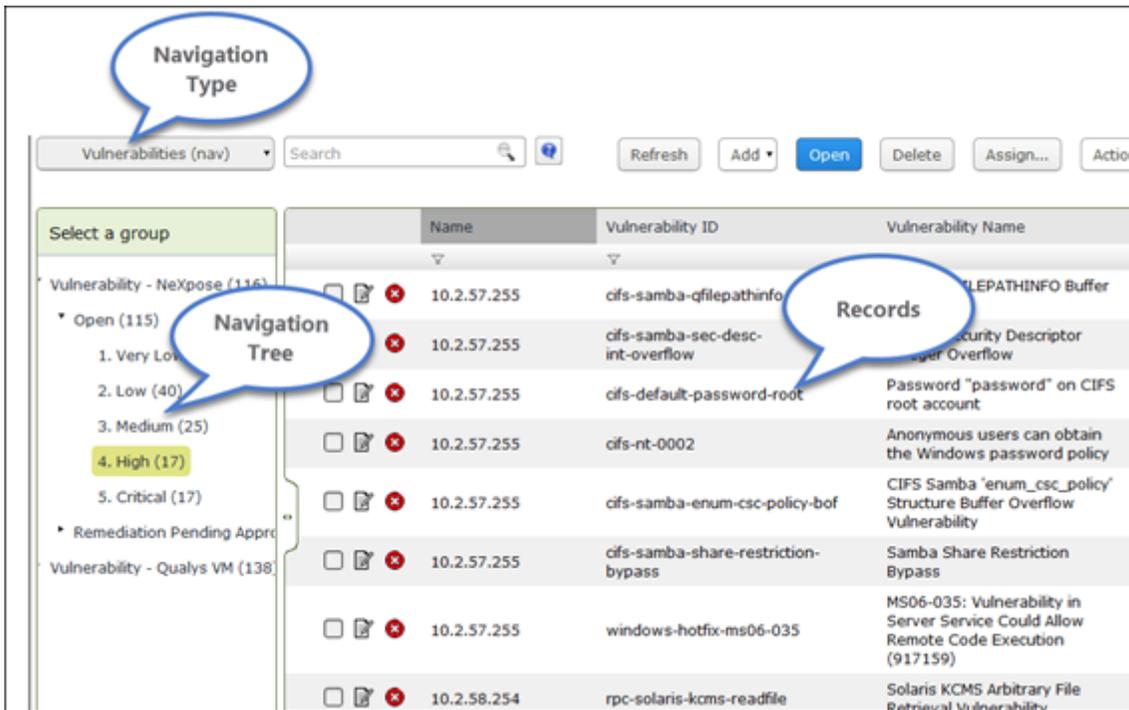
Role	Total	Waiting
Vulnerability Manager	1688	1534
Manager	182	153

The pie chart data is as follows:

- 1. Not Started, 11
- 2. Classification Data Gather
- 3. Waiting for Assessment, 3
- 4. Assessment Data Gathering, 86
- 4b. Assessment Response Review
- 4c. Assessment Finalized, 14
- 5. Entering Plans, 2
- 6. Finalized, 16

Record Navigator

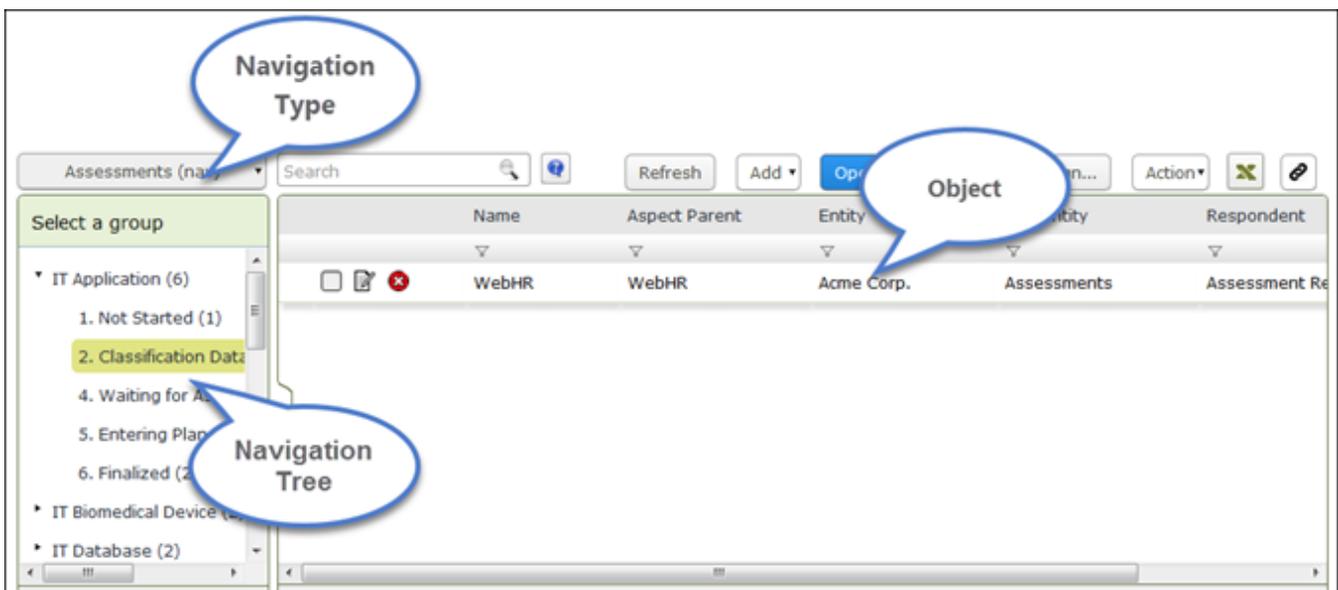
A Record Navigator tab displays one or more saved record searches that allow you to quickly and easily access records.



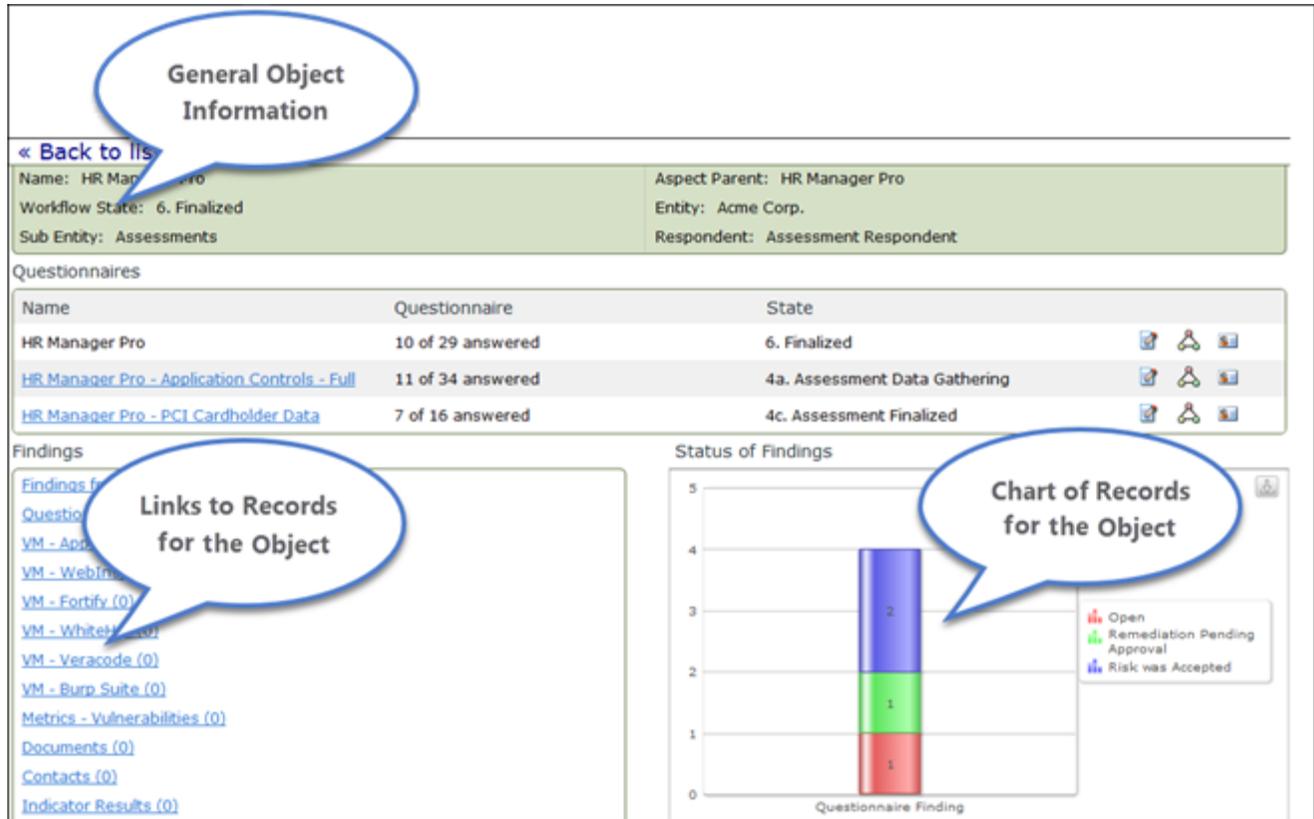
Information about records is described in the Interact with Records section.

Object Navigator

An Object Navigator tab displays one or more saved object searches that allow you to access objects quickly and easily.



Object Navigators also allow you to define a collection of widgets that will be displayed for the object once it is opened from the navigator list. This feature is unique to Objects and is not available for Record navigators.



General Object Information

« Back to IIS

Name: HR Manager Pro Aspect Parent: HR Manager Pro
 Workflow State: 6. Finalized Entity: Acme Corp.
 Sub Entity: Assessments Respondent: Assessment Respondent

Questionnaires

Name	Questionnaire	State
HR Manager Pro	10 of 29 answered	6. Finalized
HR Manager Pro - Application Controls - Full	11 of 34 answered	4a. Assessment Data Gathering
HR Manager Pro - PCI Cardholder Data	7 of 16 answered	4c. Assessment Finalized

Findings

- Findings for
- Questionnaires
- VM - Application
- VM - WebIntrusion
- VM - Fortify (0)
- VM - WhiteHat
- VM - Veracode (0)
- VM - Burp Suite (0)
- Metrics - Vulnerabilities (0)
- Documents (0)
- Contacts (0)
- Indicator Results (0)

Links to Records for the Object

Status of Findings

Chart of Records for the Object

Status	Count
Open	1
Remediation Pending Approval	1
Risk was Accepted	2

For more information on configuring home pages, refer to the document Rsam Platform Step-by-Step Tutorial – Creating a Home Page.

Interact with Assessments

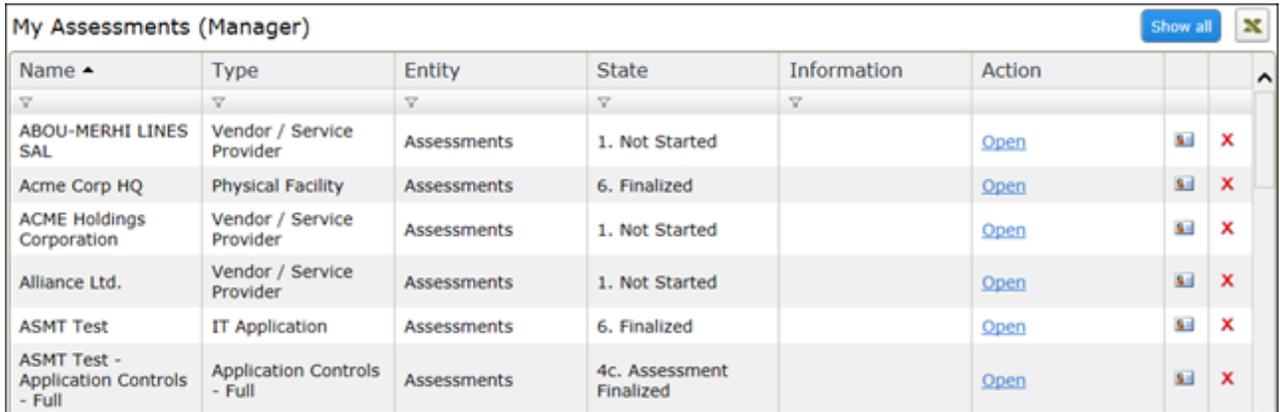
Assessment refers to the questionnaire functionality available in Rsam objects. This section explains how to open and create assessments.

Open an Assessment

You can open assessments for which you have been granted appropriate permissions. There are several methods in Rsam for locating and opening an assessment. We have already seen how to access IT Application assessments from the Assessments Object Navigator Home Page tab. So, in this example, we will open an assessment through the Assessments menu item.

To open an assessment, perform the following steps:

1. Sign in to Rsam as the `r_assessment_manager` user. Enter **Username** is `r_assessment_manager` and **Password** is `password`.
2. Navigate to **Assessments > Open Assessment by Role > Open Manager**. The **My Assessments (Manager)** page appears.
3. In the **My Assessments (Manager)** page, choose any item from the list and click the **Open** link available in the **Action** column.



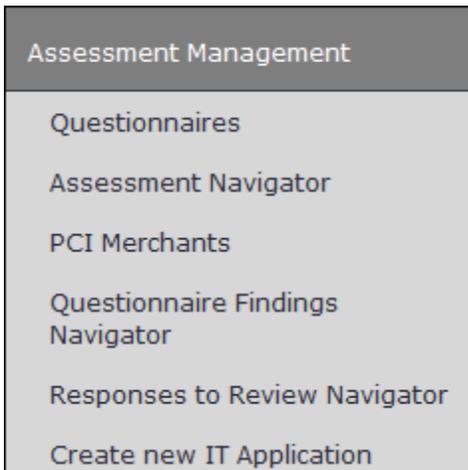
Name ▲	Type	Entity	State	Information	Action		
ABOU-MERHI LINES SAL	Vendor / Service Provider	Assessments	1. Not Started		Open		
Acme Corp HQ	Physical Facility	Assessments	6. Finalized		Open		
ACME Holdings Corporation	Vendor / Service Provider	Assessments	1. Not Started		Open		
Alliance Ltd.	Vendor / Service Provider	Assessments	1. Not Started		Open		
ASMT Test	IT Application	Assessments	6. Finalized		Open		
ASMT Test - Application Controls - Full	Application Controls - Full	Assessments	4c. Assessment Finalized		Open		

Create an Assessment

You can create assessments for object types for which you have been granted appropriate permissions. In our example, we will create an assessment for the "IT Application" object type using the Assessment Management home page.

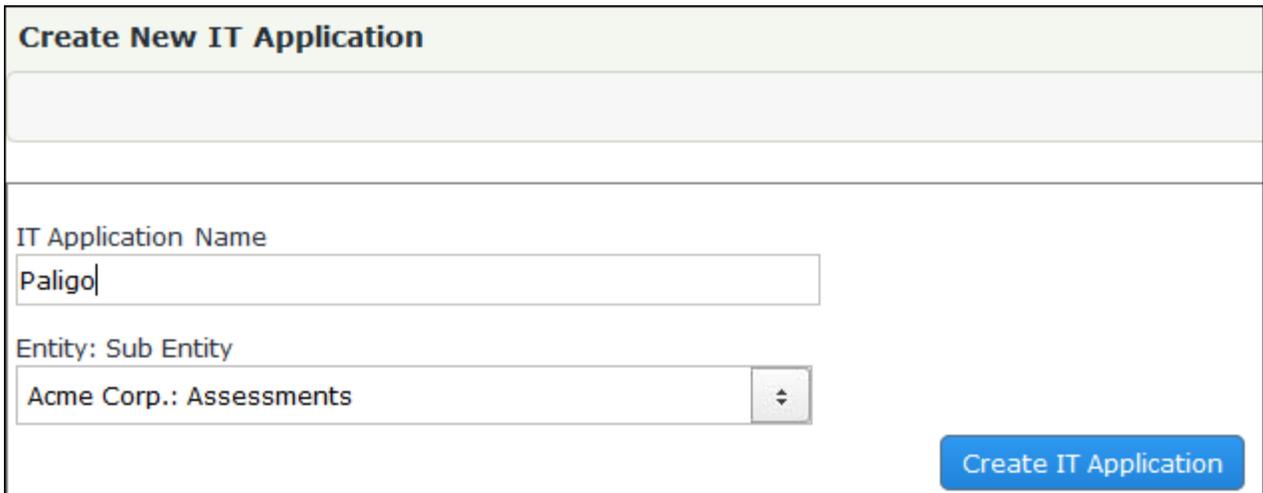
To create an assessment, perform the following steps:

1. Sign in to Rsam as the `r_assessment_manager` user. Enter **Username** is `r_assessment_manager` and **Password** is `password`.
2. From within the navigation panel on the left-hand side, navigate to **Assessment Management** and click **Create new IT Application**.



The Create New IT Application page appears.

3. Enter Paligo in the IT Application Name field and click **Create IT Application**.



Create New IT Application

IT Application Name

Entity: Sub Entity

For more detailed steps on how to create and answer assessments, refer to the documents – [Rsam Platform Step-by-Step Tutorial – Creating a Questionnaire](#) and [Rsam Platform Step-by-Step Tutorial – Creating an Assessment Questionnaire](#).

Interact with Record Categories

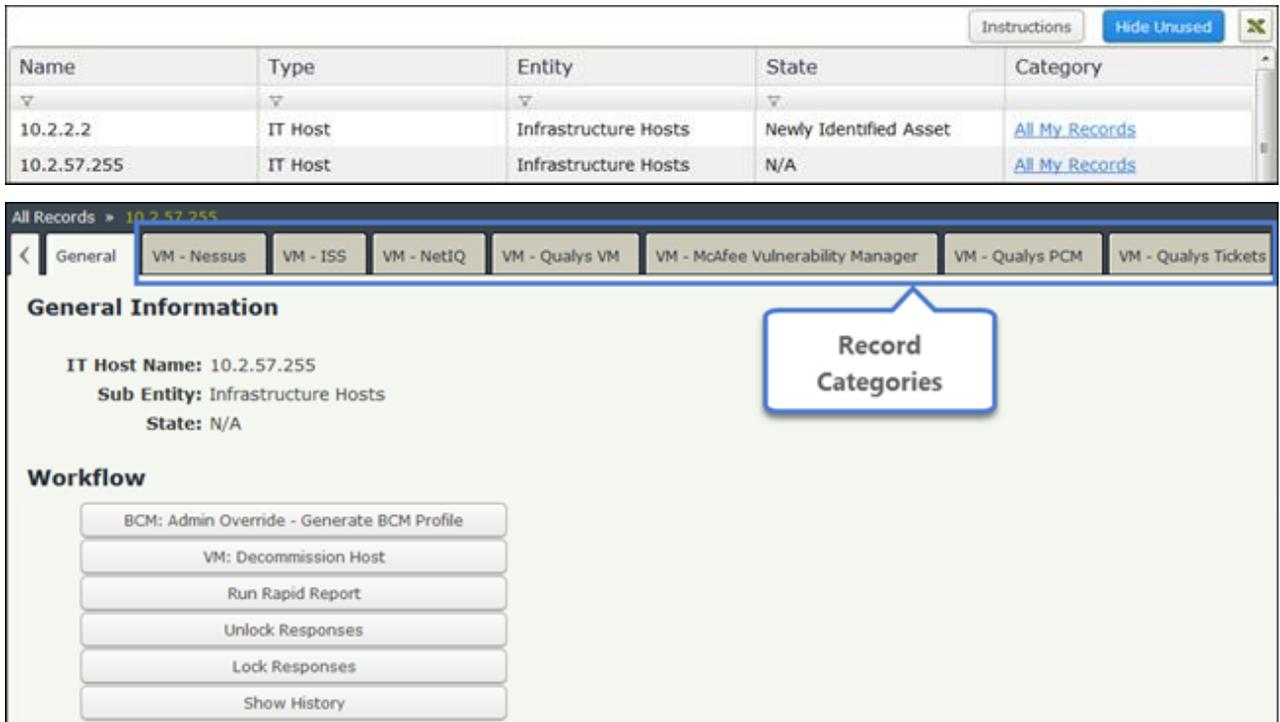
This section explains the various ways to open record categories. Record categories are the “containers” to hold records of specific types.

Open All Record Categories

Opening all record categories is a convenient way to view all record categories under a specific object. In this example, we will open all the record categories for the “10.2.57.255” IT Host object.

To open all record categories, perform the following steps:

1. Sign in to Rsam as the `r_admin` user. Enter `Username` is `r_admin` and `Password` is `password`.
2. Navigate to **Records** > **Open All**. The objects list appears.
3. In the page that appears, click the **All My Records** link available in the “10.2.57.255” object row.

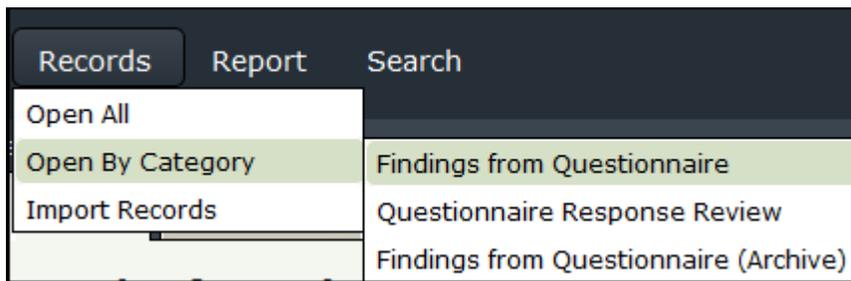


Open a Specific Record Category

When you know that the records you want to view are under a specific record category, open that record category directly. In this example, we will open the “Findings from Questionnaire” category of the “Acme Corp HQ” object.

To open the record category, stay signed in as the `r_admin` user and perform the following steps:

1. Navigate to **Records > Open By Category > Findings from Questionnaire**.



Objects associated with that Category Type appear.

2. Click **Findings from Questionnaire** in the **Category** column corresponding to the "Acme Corp HQ" object.

Name	Type	Entity	State	Category
ABOU-MERHI LINES SAL	Vendor / Service Provider	Assessments	1. Not Started	Findings from Questionnaire
Acme Corp HQ	Physical Facility	Assessments	6. Finalized	Findings from Questionnaire
Acme Corp.	Entity	Acme Corp.	N/A	Findings from Questionnaire

The object category tabs appear with the "Findings from Questionnaire" tab selected.

Findings from Questionnaire

Refresh Add Open Delete Assign... Action Wrap

Instructions

The following questionnaire responses generated gaps. For each item listed below, please complete the following steps:

- Select the item and click on **Add**, followed by the appropriate option
- Complete all required fields, and submit the record

Record Workflow State	HML	Control Name	Supplied Answer	Minimum Required Answer
Open		PHY: Physical Entrance Control	No access control	Personalized magnetic badge
Remediation Pending Approval		PHY: Access Logging	No Logging	Supervised sign-in sheet
Remediation Pending Approval		PHY: Physical Monitoring	No physical monitoring	Camera monitoring (active)
Remediation Pending Approval		PHY: Fire Alarm Testing	Recurring <12 months	Recurring <6 months

Interact with Record Types

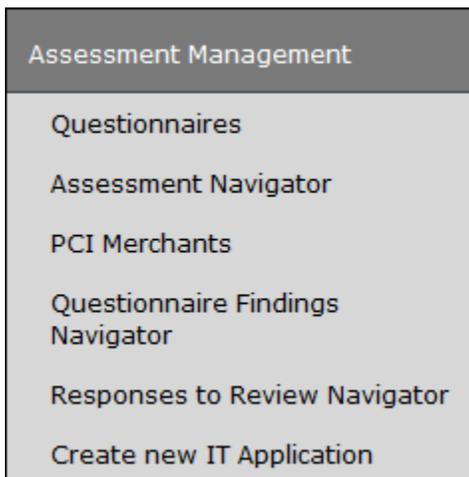
This section explains how to work with records in Rsam.

Open a Record

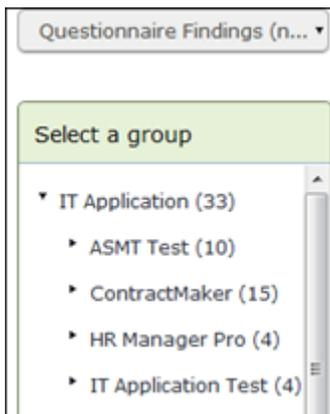
There are several ways to find records that you want to open in Rsam. One is by navigating through Record Categories as explained in Open a Specific Record Category. Another is to use a record navigator home page tab. In this example, we will use the Questionnaire Findings navigator home page tab to find and open a Questionnaire Finding record.

To open a record, stay signed in as the `r_admin` user and perform the following steps:

1. From within the navigation panel on the left-hand side, navigate to **Assessment Management > Questionnaire Findings Navigator**.



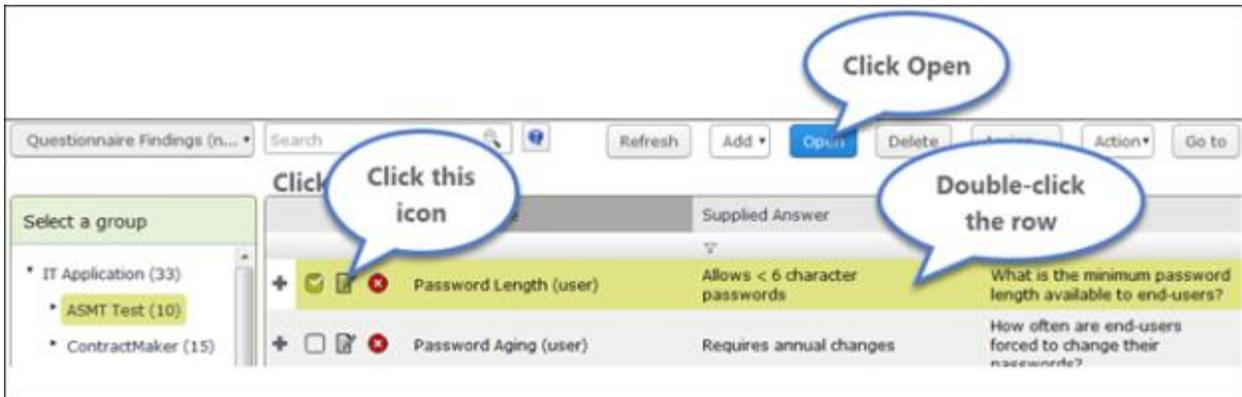
2. Expand the **IT Application** grouping, and click the **ASMT Test** sub-grouping.



The corresponding records appear.

3. Open the "Password Length (user)" record by using one of the following methods:

- Double-click the "Password length (user)" record.
- Click the  icon in the "Password length (user)" record row.
- Select the "Password Length (user)" record and click **Open**.

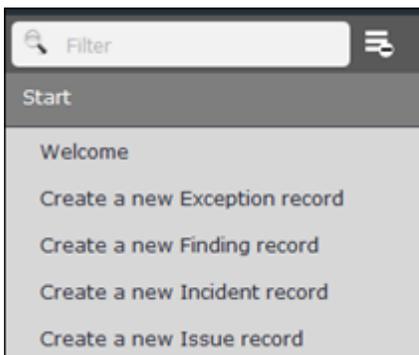


Add a New Record

Rsam provides several ways to add a new record. In this example, we will add a new Finding record through the self-registration link available on the Start home page.

To add a new record, stay signed in as the `r_admin` user and perform the following steps:

1. From within the navigation panel on the left-hand side, navigate to **Start > Create a new Finding record**.



The Finding record opens with the Finding tab selected.

2. Enter the following values for the fields listed in the record form.

Field	Value
Reportable	Yes
Universal Severity	High
Details	Demo Finding

Field	Value
Cause	Learning
Impact	High

• Finding ✔ Editable

(read, modify, delete) Submit Update Save & Close Action

Finding
Management Response
Audit Comments
Related Records
Discussion Thread
Workflow Notes

Finding ID: 3

Observation Date: 1/25/2017

Finding Owner: Demo Manager

Reportable: Yes

Universal Severity: 4. High

Details: Demo Finding Record

Cause: Learning

Impact: High

3. Click **Submit**.

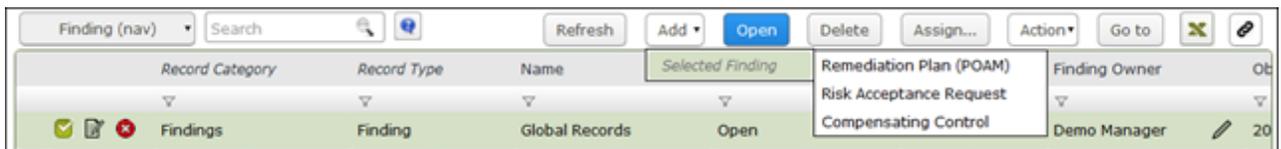
Add a Child Record

Records can be defined in a parent/child relationship. In this next example, we will add a “child” record to the “parent” Finding record that we just created in the previous section. To add a child record, stay signed in as the r_admin user and perform the following steps:

- From within the navigation panel on the left-hand side, navigate to **Finding Management > Finding Navigator**.



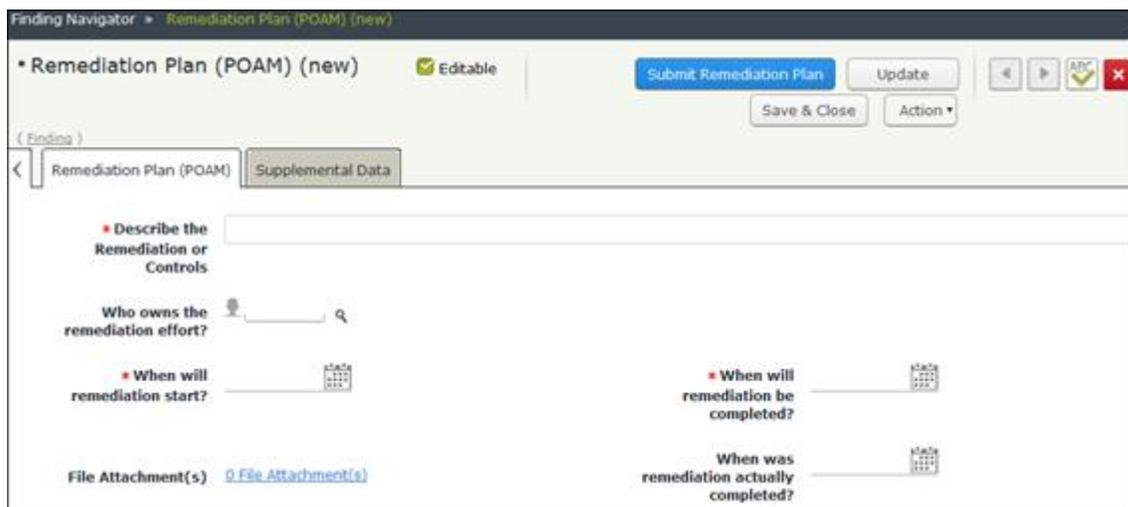
- Select the “Demo Finding” record, then click **Add > Selected Finding > Remediation Plan (POAM)**.



The **Remediation Plan (POAM)** record opens with the **Remediation Plan (POAM)** tab selected.

- Enter the following values for fields listed in the child record form.

Field	Value
Describe the Remediation or Controls	Demo Remediation Plan
When will remediation start?	Select today's date
When will remediation be completed	Select a future date



- Click **Submit Remediation Plan**.

Note: The ability to create child records depends on the defined record structure as well as the workflow state of the "parent" record. For more information on configuring record structures, refer to the document [Rsam Platform Step-by-Step Tutorial – Creating a Record Structure](#).

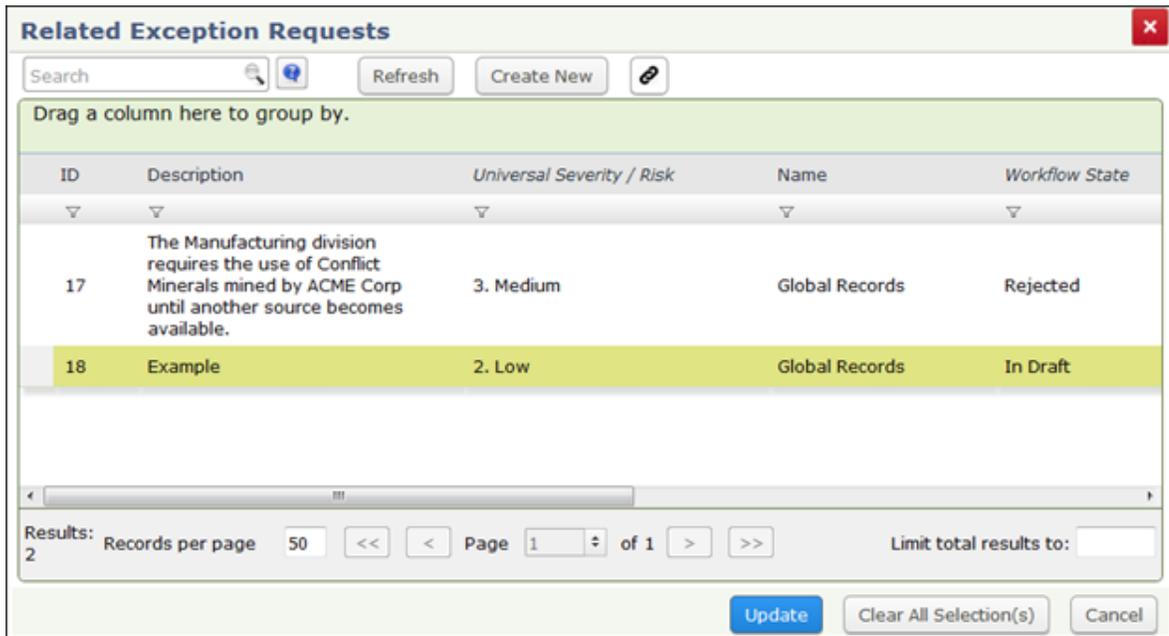
Update a Record

In this example, we will update the "Password Length (user)" record from the Finding from Questionnaire record that we have used in the Open a Record section. To update the "Password Length (user)" record, stay signed in as the r_admin user and perform the following steps:

- Open the "Password Length (user)" record using the steps in the "Open a Record" section.
- Populate the **Related Exception Requests** attribute by performing the following steps:
 - Click the spyglass icon (🔍) next to the **Related Exception Requests** attribute.



- In the dialog that appears, select the exception request "ID: 18," and click **Update**.



3. From the *How will this finding be resolved* drop-down list, select **Remediation**.



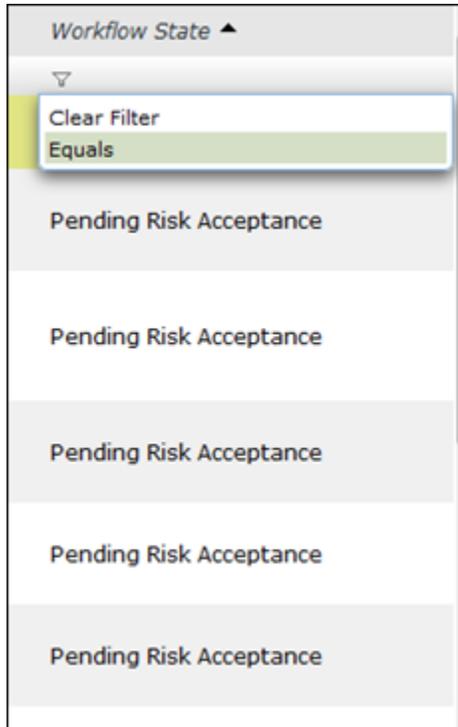
4. Click **Update** or **Save & Close**.

Filters

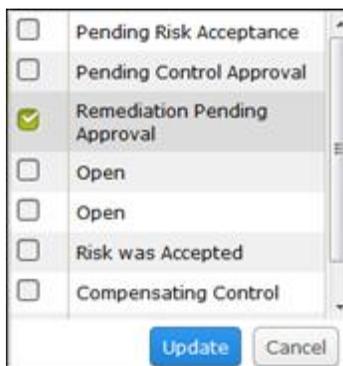
Filters allow you to find the records of interest within a search result grid. In this example, we will use the "Questionnaire Findings" navigator to filter records of the "ASMT Test" object to show only those that are in the "Remediation Pending Approval" workflow state.

To filter records, stay signed in as the r_admin user and perform the following steps:

1. From within the navigation panel on the left-hand side, navigate to Assessment Management > Questionnaire Findings Navigator.
2. Expand **IT Application** and click **ASMT Test**. The records appear.
3. Locate the "Workflow State" column. You may need to scroll to the right in the search result to find it.
4. To apply the filter on the "Workflow State" column, perform one of the following steps:
 - Click the **Filter** icon and select **Equals**.



- Double-click in the space next to the **Filter** icon (Rsam will assume you want to use the Equals operator).
5. In the options that appear, select the checkbox for **Remediation Pending Approval** and click **Update**.



Copy a Link

Copying a record or search link is a great way to quickly share content with other users. For example, you can paste the link to a specific record into an email, allowing the recipient to directly access the record without having to search for it. You can also copy the link to a home page tab. In this example, we will copy the link to the "Questionnaire Findings" navigator home page tab.

To copy the link, stay signed in as the `r_admin` user and perform the following steps:

1. From within the navigation panel, navigate to **Assessment Management > Questionnaire Findings Navigator**.
2. Click the  icon.



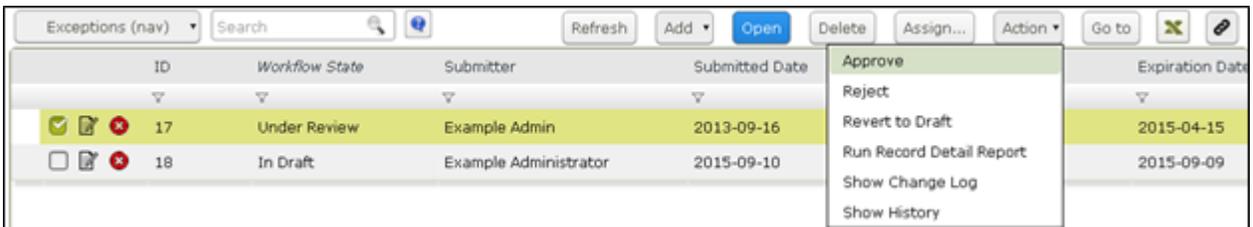
The link is now copied to your clipboard and can be shared with other users through email, instant message, and more.

Perform a Workflow Action

The Action menu allows you to perform workflow actions. Available workflow actions are specific to the record type, the current workflow state, and your role. In our example, we will move an Exception record from the "Under Review" workflow state to the "Approve" workflow state.

To perform the workflow action, stay signed in as the `r_admin` user and perform the following steps:

1. From within the navigation panel on the left-hand side, navigate to **Exception Management > Exceptions Navigator**.
2. Select the first item in the list with Workflow State "Under Review," then click **Action** and select **Approve**.



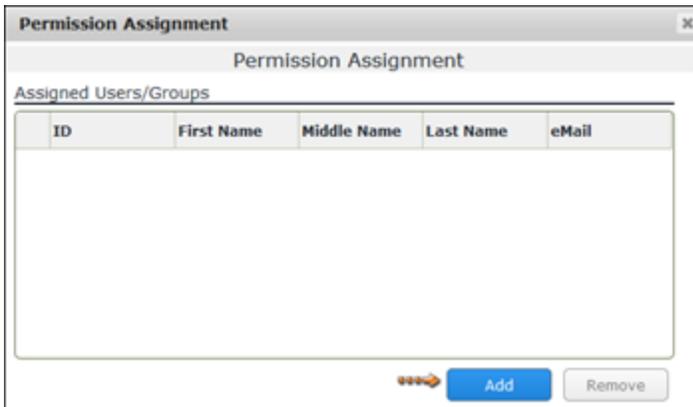
The record workflow state advances to the next state, "Pending Manager Sign-Off".

Assign a Record

The Assign button allows you to assign records to other users. In our example, we will assign the "Password Length (user)" record to the `r_demo_owner` user using the **Assign** button.

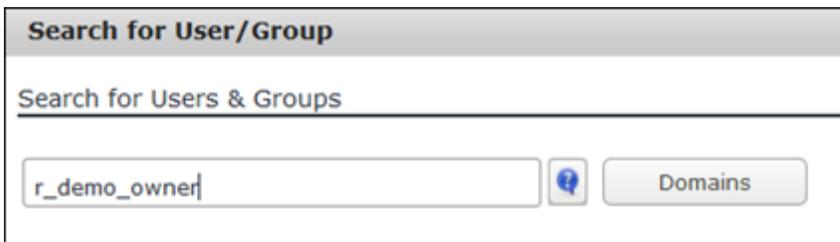
To assign a record using the Assign button method, stay signed in as the `r_admin` user and perform the following steps:

1. From within the navigation panel on the left-hand side, navigate to **Assessment Management > Questionnaire Findings Navigator**.
2. Expand **IT Application** and click **ASMT Test**. The records appear.
3. Select the "Password Length (user)" record and click **Assign**. The **Permission Assignment** dialog appears.
4. Click **Add**.

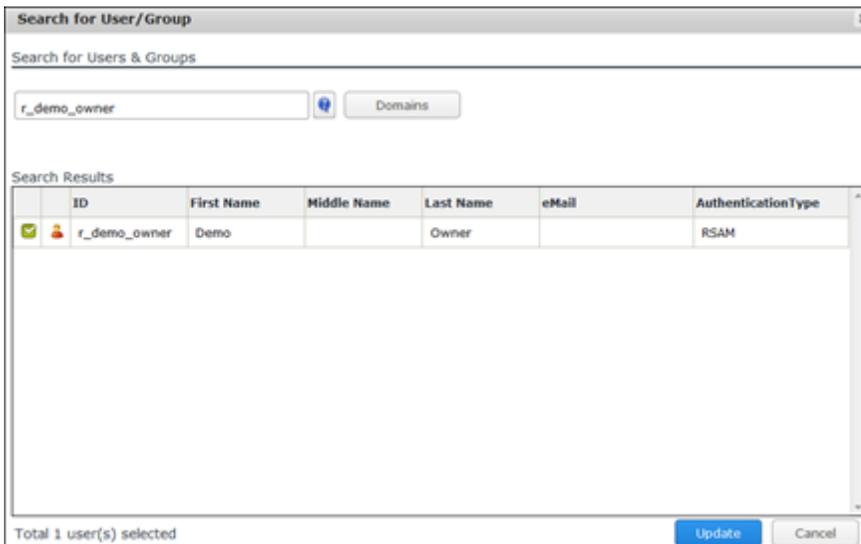


The **Search User/Group** dialog appears.

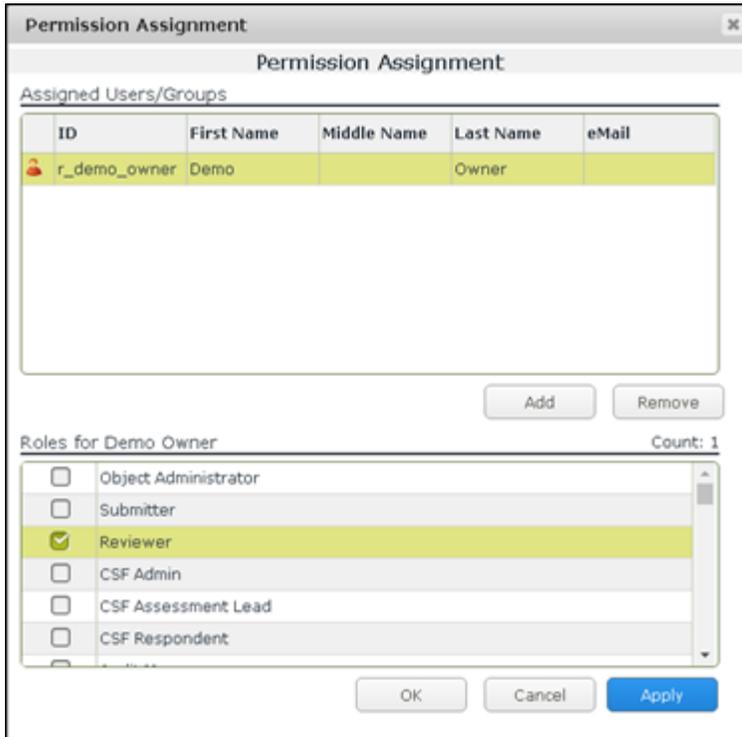
5. Type `r_demo_owner` in the **Search** box.



6. Under **Search Results**, select the checkbox for `r_demo_owner` and click **Update**.



- Under **Roles for Demo Owner**, select the checkbox for **Reviewer**.



- Click **Apply** and click **OK**.

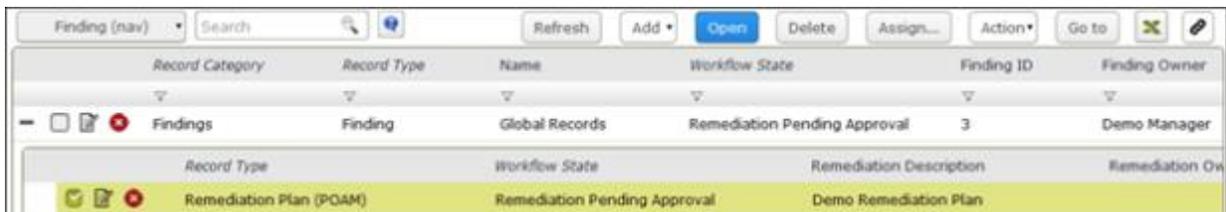
Delete a Record

The Delete button allows you to delete records. In our example, we will delete the "Demo Remediation Plan" record created in the [Add a Child Record](#) section. To delete the record, stay signed in as the r_admin user and perform the following steps:

- From within the navigation panel at the left-hand side, navigate to **Finding Management > Finding Navigator**.
- Expand the "Demo Finding" record row by clicking the **+** icon.



- Select the "Demo Remediation Plan" record and click **Delete**.



- In the confirmation message that appears, click **Yes**.

Interact with Searches and Charts

This section presents a high-level overview of working with searches and charts. For more details, refer to the document [Rsam Platform Step-by-Step Tutorial – Creating Record Searches and Charts](#).

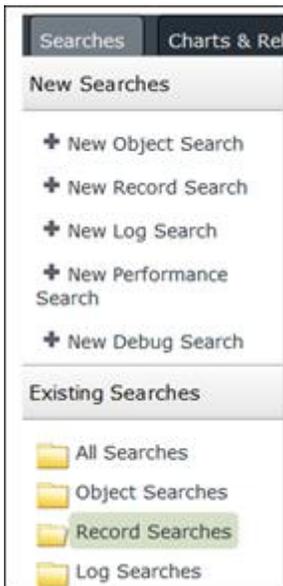
Open a Saved Search

This section explains the steps to open an existing saved search. In this example, we will open the “Audits by Status” record search. Stay signed in as the r_admin user and perform the following steps:

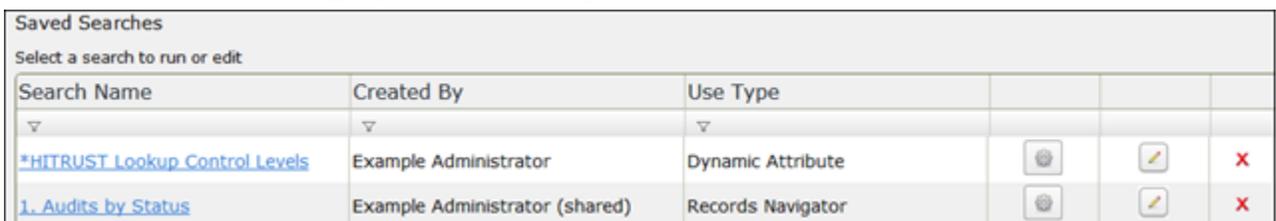
1. Navigate to **Search > Saved Searches & Charts** (you can also click directly on the **Search** menu item).



2. Under **Existing Searches**, click **Record Searches**.



3. In the **Saved Searches** grid, click **Audits by Status**.

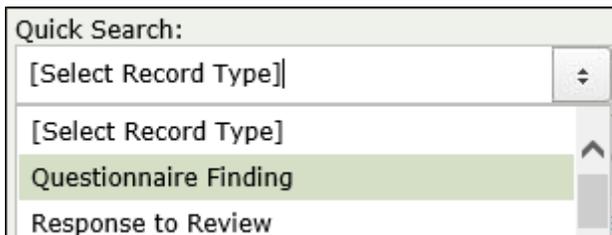


Search Name	Created By	Use Type			
▼	▼	▼			
*HITRUST Lookup Control Levels	Example Administrator	Dynamic Attribute			
1. Audits by Status	Example Administrator (shared)	Records Navigator			

Add a Saved Search

In this section, we will walk you through the high-level steps for creating a search. For more detailed instructions on how to create and manage searches and charts, refer to the document *Rsam Platform Step-by-Step Tutorial - Creating Searches and Charts*. Stay signed in as the `r_admin` user and perform the following steps:

1. Navigate to **Search > Saved Searches & Charts**.
2. Under **New Search**, click **New Record Search**.
3. Select a record type from the **Quick Search** drop-down list.



The default search attributes for the record appear.

4. You may add additional fields in the search and apply filters, groupings, and sort order.
5. Click **Update** to view your search results.
6. Click **Save** to save the search for later use.
7. In the **Search Manager** dialog that appears, perform the following:
 - a. Provide a name for the search.
 - b. Select **Record Navigator**.
 - c. Select the user role(s) for which the search must be visible.
 - d. Click **Save**.

Update an Existing Saved Search

In this section, we will walk you through the steps to update a search. In our example, we will update the "Audits by Status" record search by adding the Related Business Units field to its results. To update the "Audits by Status" search, stay signed in as the r_admin user and perform the following steps:

1. Navigate to **Search > Saved Searches & Charts**.
2. Under **Existing Searches**, click **Record Searches**.
3. Click the **Audits by Status** search to execute it.
4. Click the **Search Criteria** button above the search results. The **Select Fields** dialog appears.
5. Add the **Related Business Units** field by performing the following steps:
 - a. In the first unpopulated row, click in the empty cell in the **Field** column.
 - b. Begin typing **Related Business Units** to filter the list of available attributes and select the **Related Business Units** attribute.

Field Type	Field	Display Order	Field Filter
Record Fields	Record Type		Audit
Record Attribute	Audit Name	1	
Record Attribute	Audit Type	2	
Record Fields	Record Workflow State	3	
Record Attribute	Audit Manager	4	
Record Attribute	Lead Auditor	5	
Record Attribute	Start Date	6	
Record Attribute	End Date	7	
Record Attribute	Plan Name	8	
Record Attribute	relat		
	IAM: AUD - Related Auditable Entity		
	Related Business Units		

- c. Click **Update**. The search now includes the "Related Business Units" column on the far right.

Delete a Search

In this section, we will walk you through the steps to delete a search. In our example, we will delete the "Audits by Status" search. To delete the "Audits by Status" search, stay signed in as the r_admin user and perform the following steps:

1. Navigate to **Search > Saved Searches & Charts**.
2. Under **Existing Searches**, click **Record Searches**.
3. In the **Saved Searches** list, click the **X** icon available in the 1. Audits by Status search row.

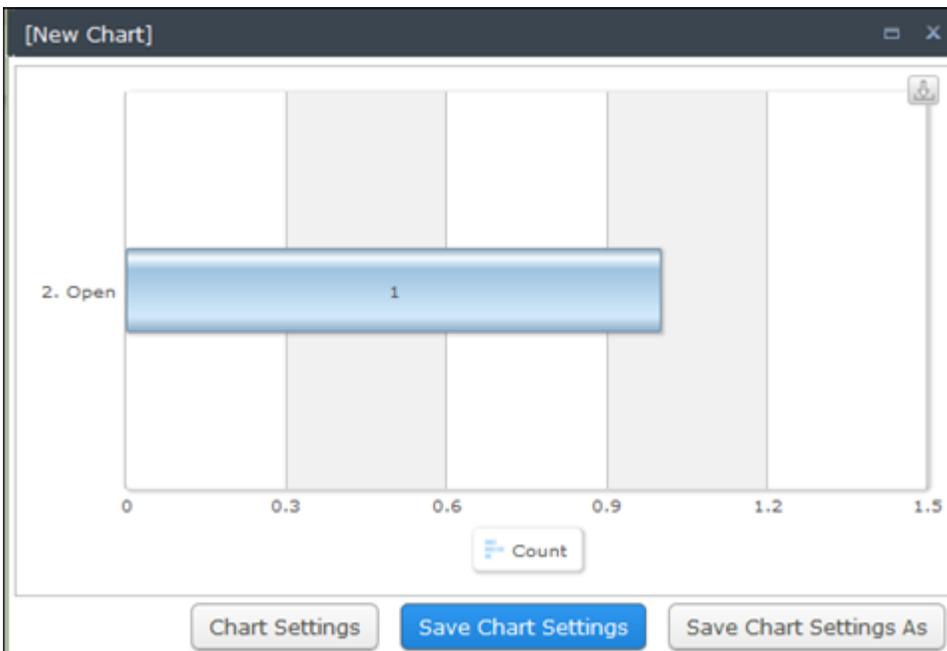
Saved Searches					
Select a search to run or edit					
Search Name	Created By	Use Type			
*HITRUST Lookup Control Levels	Example Administrator	Dynamic Attribute			
1. Audits by Status	Example Administrator (shared)	Records Navigator			

Add a Chart

A chart is created from an Rsam search. In this section, we will walk you through the steps to add a chart. In this example, we will use the "Findings by Status" record search as the basis for the chart. For detailed step-by-step instructions on how to create charts, refer to the document Rsam Platform Step-by-Step Tutorial - Creating Searches and Charts.

To add a chart, stay signed in as the r_admin user and perform the following steps:

1. Navigate to **Search > Saved Searches & Charts**.
2. Under **Existing Searches**, click **Record Searches**.
3. Click **Findings by Status**. The search details are displayed.
4. Click the chart icon.
5. Click **Save Chart Settings**.



The New Chart dialog appears.

6. Enter "My Findings Chart" in the *Please enter new chart name* field.
7. Click **OK**.

Update a Chart

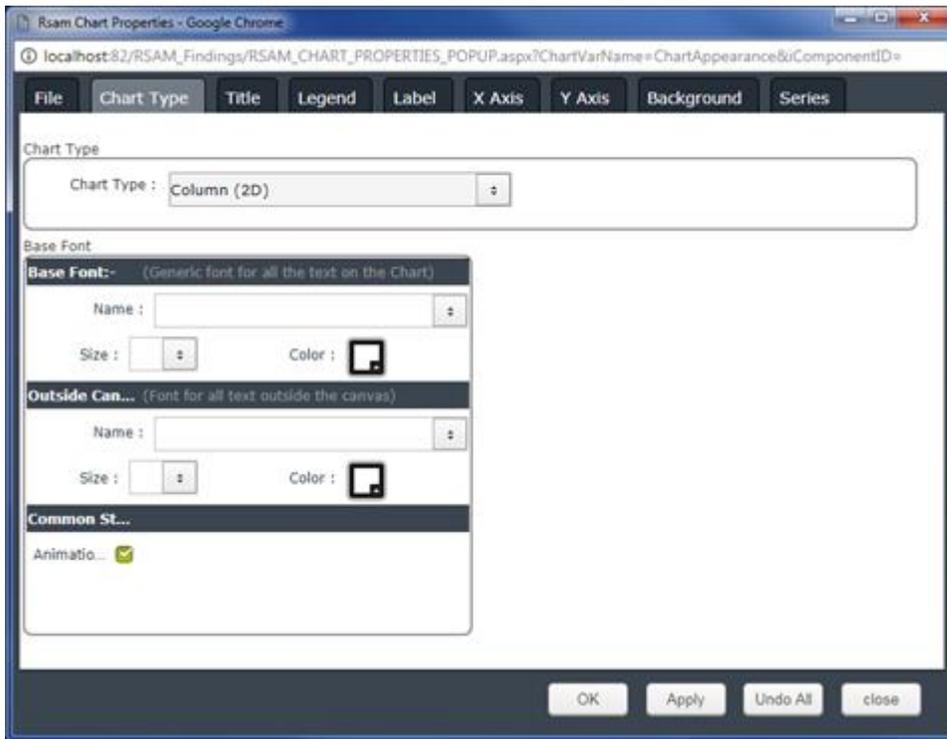
In this section, we will walk you through the steps to update the My Findings Chart created in the "Add a Chart" section by changing the chart type to "Column 2D." To update the chart, stay signed in as the r_admin user and perform the following steps:

1. Navigate to **Search > Saved Searches & Charts**.
2. Click **Charts & Related Searches**.
3. Click **Record Charts**.
4. In the **Saved Charts** list, click the pencil icon in the My Findings Chart row.

Saved Charts					
Select a chart to display. It will load related search automatically					
Chart Name	Created By	Related Search			
Indicator Results by Type (past 30 days)	Example Administrator	Indicator Results by Type (past 30 days)			
Issues by Severity	Example Administrator	ISM: Issue by Severity (chart)			
Issues by Workflow and Severity	Example Administrator	ISM: Issues by Workflow State and Severity (chart)			
Issues by Workflow State	Example Administrator	ISM: Issues by Workflow State (chart)			
My Findings Chart	Example Administrator	5. Findings by Status			

The **Rsam Chart Properties** dialog appears.

5. On the **Chart Type** tab, select **Column (2D)** from the *Chart Type* drop-down list.

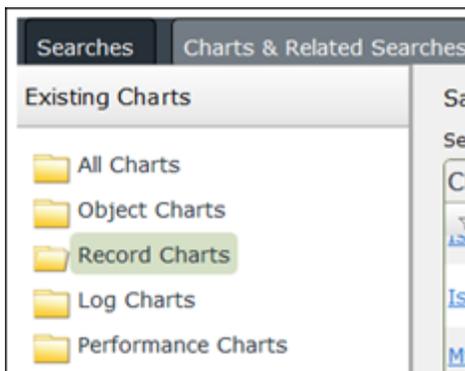


6. Click **Apply** and then click **OK**.

Delete a Chart

In this section, we will walk you through the steps to delete the "My Findings Chart" created in the "Add a Chart" section. To delete the "My Findings Chart," stay signed in as the r_admin user and perform the following steps:

1. Navigate to **Search > Saved Searches & Charts**.
2. Click **Charts & Related Searches**.



3. Click Record Charts.
4. In the Saved Charts list, click the X icon in the My Findings Chart row.

- In the confirmation dialog that appears, click OK to confirm the deletion.

Saved Charts					
Select a chart to display. It will load related search automatically					
Chart Name	Created By	Related Search			
ISSUES BY SEVERITY BY SEVERITY	Example Administrator	Severity (chart)			
Issues by Workflow State	Example Administrator	ISM: Issues by Workflow State (chart)			X
My Findings Chart	Example Administrator	5. Findings by Status			X

Last Search

Rsam automatically saves the last search criteria and makes it available via the **Search > Last Search** menu. As the last search opened is "Findings by Status," the same search criteria will be displayed on clicking **Last Search**.

[Last Search]

Search

Select a group	Workflow State				
2. Open (1)	Finding ID	Details	Reportable	Observation Date	Severity
	1	Published Code Not Peer Reviewed		2015-06-16	Medium