



Archer® Exchange

# Authoritative Sources

## Data Import Guide

Archer Platform Version 6.13 and later

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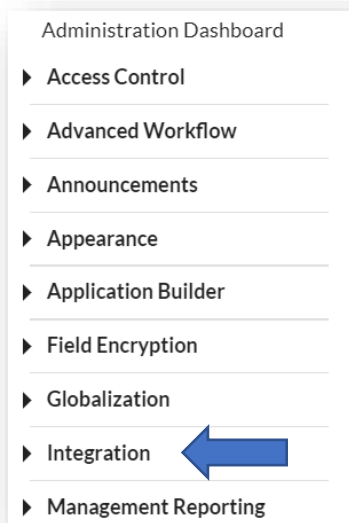
## Chapter 1: New Content Import for Authoritative Sources

This section covers how to import a new authoritative source into the Authoritative Sources application in Archer.

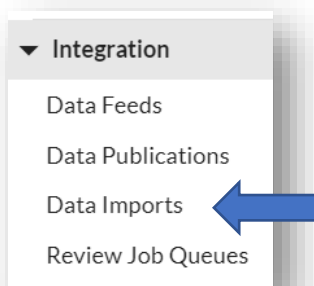
1. From the Archer navigation bar, click on the wrench icon.



2. Select **Integration**

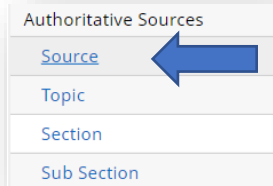


3. Select **Data Imports**

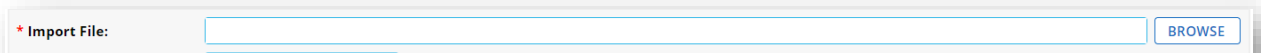


4. Scroll down to Authoritative Sources and select **Source**.

**Note:** Authoritative Sources must be imported in this order each time: Source, Topic, Section, Sub Section.



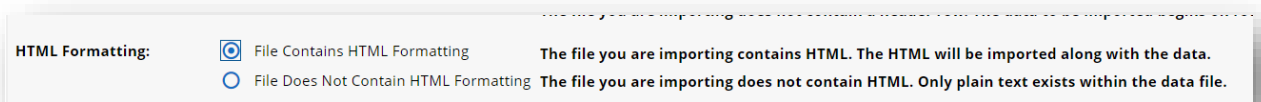
5. Select **Browse**



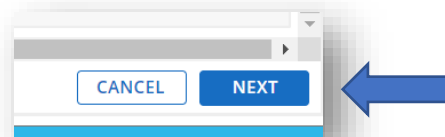
6. Then select the appropriate file (which has \_01\_AuthSrc\_SourceLevel)

**EXAMPLE:** \_01\_AuthSrc\_SourceLevel

7. Select the **File Contains HTML Formatting** in the HTML Formatting section



8. Click **Next** in the bottom right corner



9. Make sure that all import file names and fields match

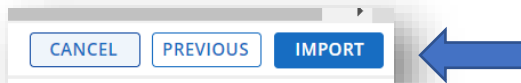
General Information ⓘ					
Import Type:	Create New Records				
Import Field Mapping ⓘ					
	Source Name	Source Description	Source Type	Source Version	Source Links
Application Fields	Source Name	Source Description	Source Type	Source Version	Source Links
Field Type	Text	Text	Values List	Text	External Links

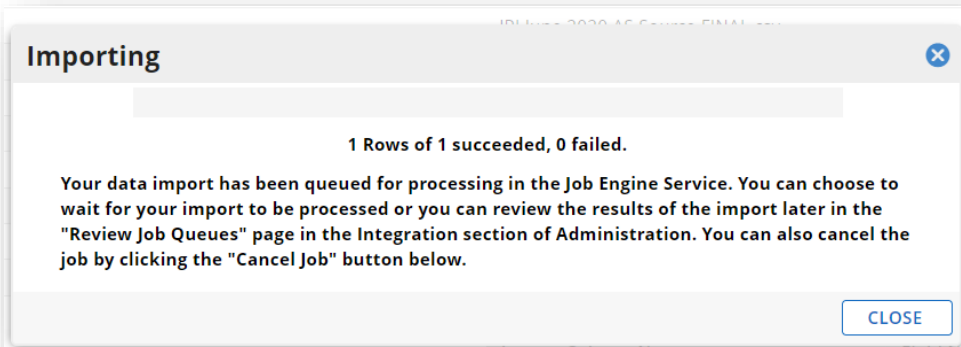
If they do not, please refer to the [troubleshooting section](#) below.

10. Once you click next, make sure that all file names and fields match:

Application Record	
Import Column Name	Field Name
01 : Source Name	Source Name
02 : Source Description	Source Description
03 : Source Type	Source Type
04 : Source Version	Source Version
05 : Source Links	Source Links
06 : Content Source	Content Source
07 : Disclaimer	Disclaimer

11. Select **Import**

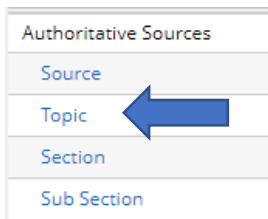




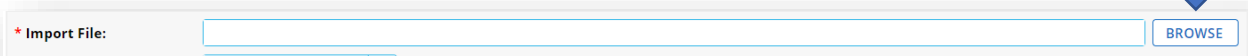
The pop-up window will update to include the number of rows total then the number of rows successfully populated.

*If failure occurs, see the [troubleshooting portion](#) at the end of the document.*

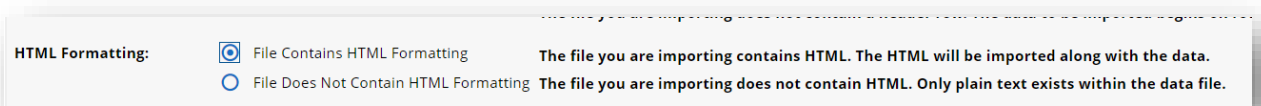
12. Next, repeat this process with the **Topic Level** csv file.



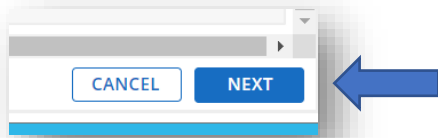
13. **Browse** and select the file that ends with `_02_AuthSrc_TopicLevel`



14. Select the **File Contains HTML Formatting** in the HTML Formatting section



15. Click **Next** in the bottom right corner

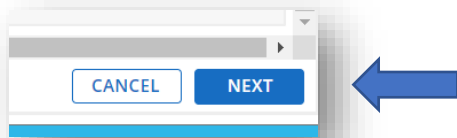


16. Make sure that all import file names and fields match

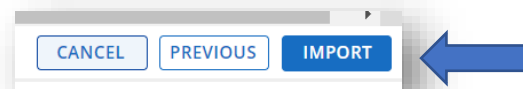
Import Field Mapping					
	Source Reference(s)	Topic ID	Topic Name	Topic Description	Content Source
Application Fields	Source Reference(s) (Source Name)	Topic ID	Topic Name	Topic Description	Content Source
Field Type	Text	Text	Text	Text	Values List

**Note:** For the Topic Level, the Source Reference will always be Source Name. *This is important because it will match up with the Source Level portion of the document.*

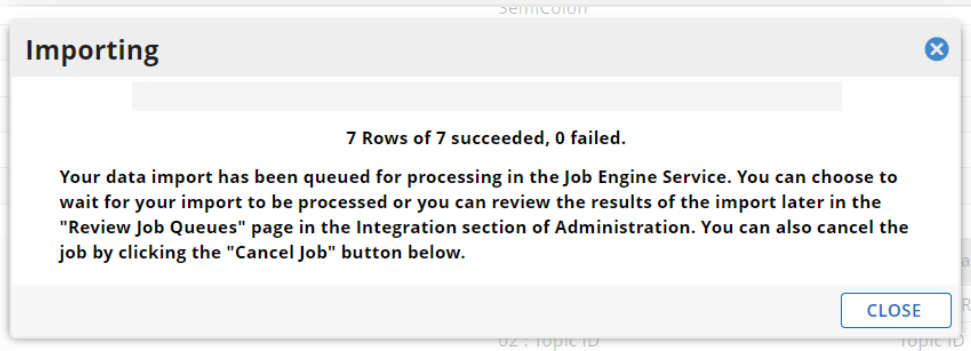
17. Click **Next** in the bottom right corner



18. Select **Import**



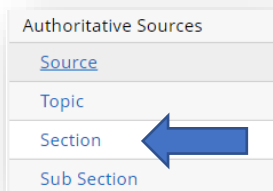




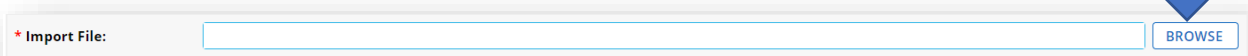
The pop-up window will update to include the number of rows total then the number of rows successfully populated.

*If failure occurs, see the [troubleshooting portion](#) at the end of the document.* Then repeat this process with the **Section Level** csv document.

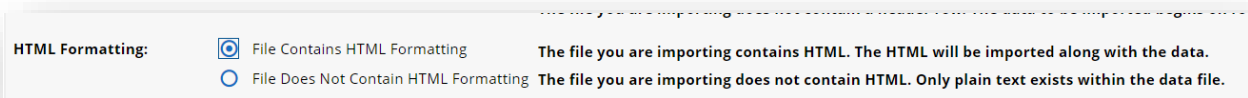
19. Next, repeat this process with the **Section Level** csv file.



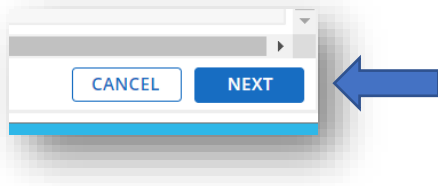
20. **Browse** and select the file that ends with `_03_AuthSrc_SectionLevel`



21. Select the **File Contains HTML Formatting** in the HTML Formatting section



22. Click **Next** in the bottom right corner



23. Make sure that all import file names and fields match

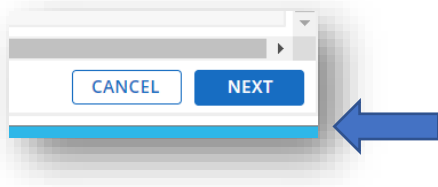
Topic Reference(s)	Section ID	Section Name	Section Description	Content Source
Topic Reference(s) (Topic ID)	Section ID	Section Name	Section Description	Content Source
Text	Text	Text	Text	Values List

**Note:** For the **Section** level, the **Topic Reference** will always be **Topic ID**. *This is important because it will match up with the Topic Level portion of the document.*

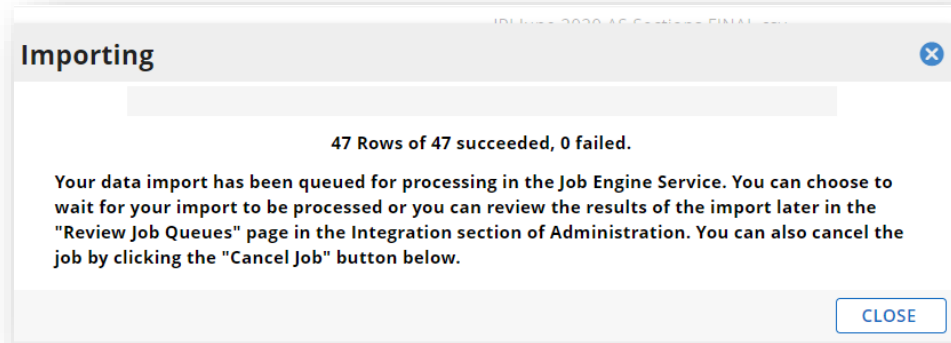
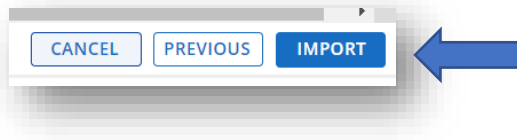
24. The **Section** level and the **Sub Section** level can have mapping to the **Control Standards** application and/or the **Control Procedures** application. Both of those will map to the ID (*not the name*).

Section Mapping Status	Control Standards	Control Procedures
Section Mapping Status	Control Standards (Standard ID)	Control Procedures (Procedure ID)
Values List	Text	Text

25. Click **Next** in the bottom right corner



26. Select **Import**



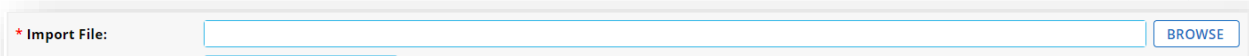
The top up window will update to include the number of rows total then the number of rows successfully populated.

*If failure occurs, see the [troubleshooting portion](#) at the end of the document.*

27. Next, repeat this process with the **Sub Section Level** csv document.



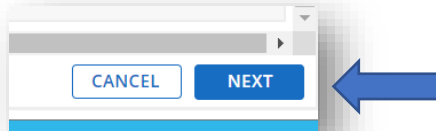
28. **Browse** and select the file that ends with `_04_AuthSrc_SubSectionLevel`



29. Select the **File Contains HTML Formatting** in the HTML Formatting section

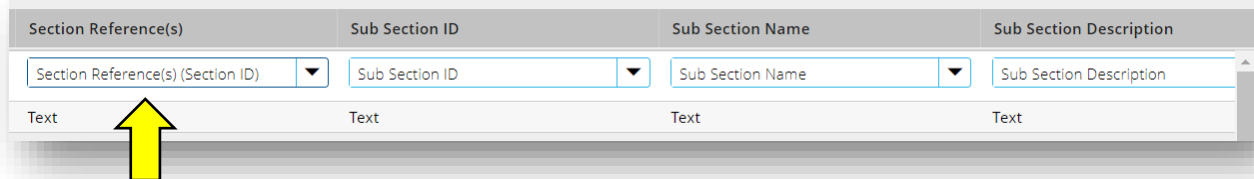
HTML Formatting:  File Contains HTML Formatting **The file you are importing contains HTML. The HTML will be imported along with the data.**  
 File Does Not Contain HTML Formatting **The file you are importing does not contain HTML. Only plain text exists within the data file.**

30. Click **Next** in the bottom right corner



31. Make sure that all import file names and fields match

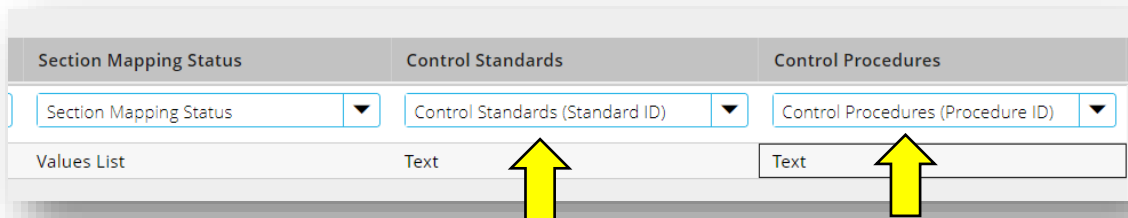
Section Reference(s)	Sub Section ID	Sub Section Name	Sub Section Description
Section Reference(s) (Section ID) ▼	Sub Section ID ▼	Sub Section Name ▼	Sub Section Description
Text	Text	Text	Text



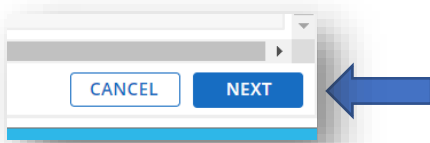
**Note:** For the **Sub Section Level**, the Source Reference will always be Section ID. *This is important because it will match up with the Topic Level portion of the document.*

32. The **Section Level** and the **Sub Section Level** can have mapping to the control standards application and/or the control procedures application. Both of those will map to the ID (*not the name*).

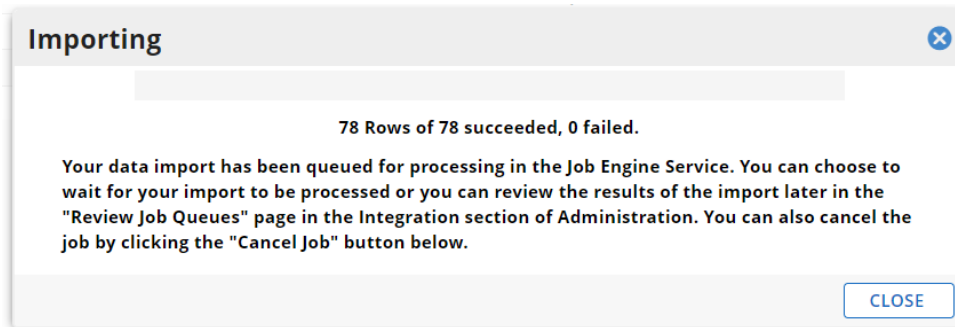
Section Mapping Status	Control Standards	Control Procedures
Section Mapping Status ▼	Control Standards (Standard ID) ▼	Control Procedures (Procedure ID) ▼
Values List	Text	Text



33. Click **Next** in the bottom right corner



### 33. Select **Import**



The top up window will update to include the number of rows total then the number of rows successfully populated.

*If failure occurs, see the [troubleshooting portion](#) at the end of the document.*

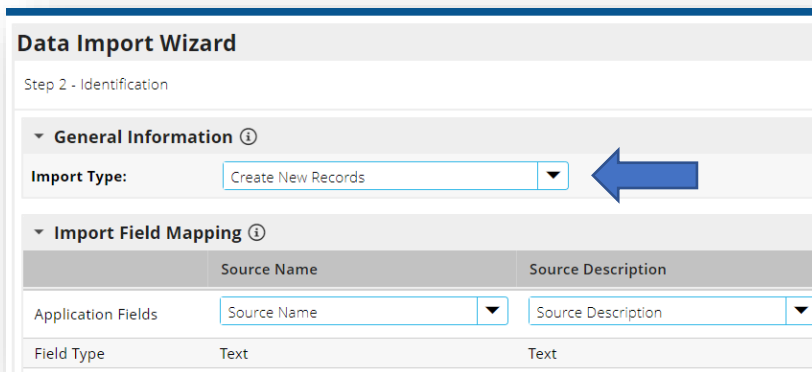
34. After all four sections of the authoritative source have been imported successfully, move on to the [Confirming Your Content Imported Correctly](#) section of this document to confirm everything imported as expected.

## Chapter 2: Update Content Import for Authoritative Sources

This section covers how to update existing authoritative sources in the Authoritative Sources application in Archer.

**Note:** There is one significant change between creating a new content import and updating an existing content import that occurs in Step 2 of the process.

1. During Step 2 of the import process, change the **Import Type** from *Create New Records* to *Update Existing Records*.



**Data Import Wizard**  
Step 2 - Identification

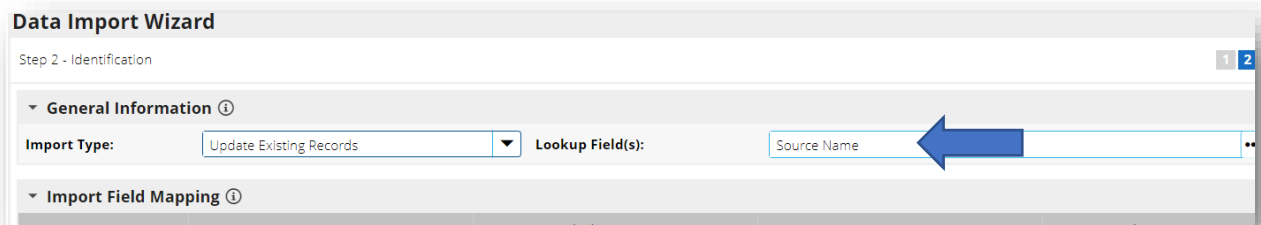
**General Information**

**Import Type:** Create New Records

**Import Field Mapping**

	Source Name	Source Description
Application Fields	Source Name	Source Description
Field Type	Text	Text

2. Next, update the **Lookup Field** to the section of the authoritative source you want to update.



**Data Import Wizard**  
Step 2 - Identification

**General Information**

**Import Type:** Update Existing Records

**Lookup Field(s):** Source Name

**Import Field Mapping**

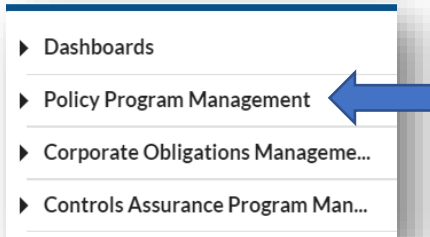
**Note:** The Lookup field will vary based on the section of the content file that is being imported:

- For **Source** files, the Lookup Field will be *Source Name*.
- For **Topic** files, the Lookup Field will be *Topic ID*.
- For **Section** files, the Lookup Field will be *Section ID*.
- For **Sub Section** files, the Lookup Field will be *Sub Section ID*.

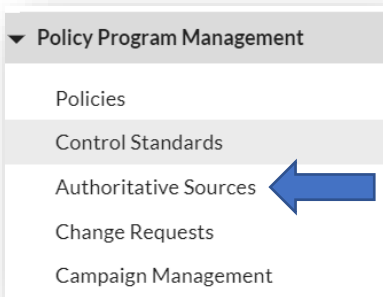
## Chapter 3: Confirming Your Content Imported Correctly

This section covers how to confirm that your authoritative source has imported correctly.

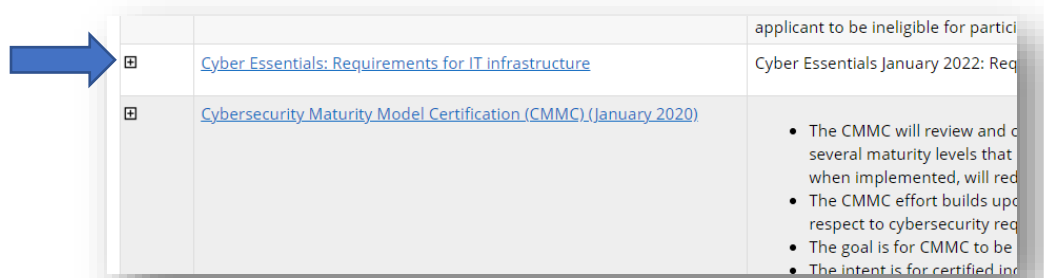
1. In Archer, navigate to the **Regulatory and Corporate Compliance Workspace** and select **Policy Program Management**.



2. Select **Authoritative Sources**



3. Scroll the list of authoritative sources and select the **Source** file name and click the plus sign to expand.



- You can continue to expand each level by clicking on the plus signs to confirm that the **Source**, **Topic**, **Section**, and **Sub Section** levels are all linked as expected.

Cyber Essentials: Requirements for IT infrastructure		Applicants to be eligible for participation in the program
Cyber Essentials January 2022: Requirements for IT infrastructure		
Topic Name	Topic Description	
01 Preface	Introduction	
Section Name	Section Description	
01.01 5 Technical Control Themes	<p>We specify the requirements under five technical control themes</p> <ul style="list-style-type: none"> <li>• firewalls</li> <li>• secure configuration</li> <li>• user access control</li> <li>• malware protection</li> <li>• security update management</li> </ul> <p>As a Cyber Essentials scheme Applicant, you must ensure that you be required to supply various forms of evidence before your choice you seek.</p>	

- Next, you can confirm that your controls mapped as expected. To enter the record, click the **Source** name in blue.

[Cyber Essentials: Requirements for IT infrastructure](#)

- This will take you to the **Source** level of the file. From this view, you can confirm the number of Control Standards associated with this authoritative source via the **Number of Control Standards** field.

▼ AUTHORITATIVE SOURCE

- Source Name: Cyber Essentials: Requirements for IT infrastructure
- Content Source: RSA Archer
- Source Description: Cyber Essentials January 2022: Requirements for IT infrastructure
- Source Version: January 2022
- Source Type: Industry Standard
- Source Links:
- Topic Reference(s): [CERIT-01](#), [CERIT-02](#), [CERIT-03](#), [CERIT-04](#), [CERIT-05](#), [CERIT-06](#), [CERIT-07](#)
- Criticality:
- Source Criticality Value: 0
- Number of Control Standards: 12





- To view the control standards and/or control procedures that are linked to the authoritative source, navigate to the mapped **Section** or **Sub Section** levels of the authoritative source record, and select the **Control Mappings** tab.

Criticality: Non-Key

Section Reference(s): [CERIT-06.03](#)

Related to Key Controls: 1

SubSection Criticality Value:

Number of Control Standards: 2

Sub Section Mapping Status: Mapped

Compliance Status | **Control Mappings** | Question Library | Findings

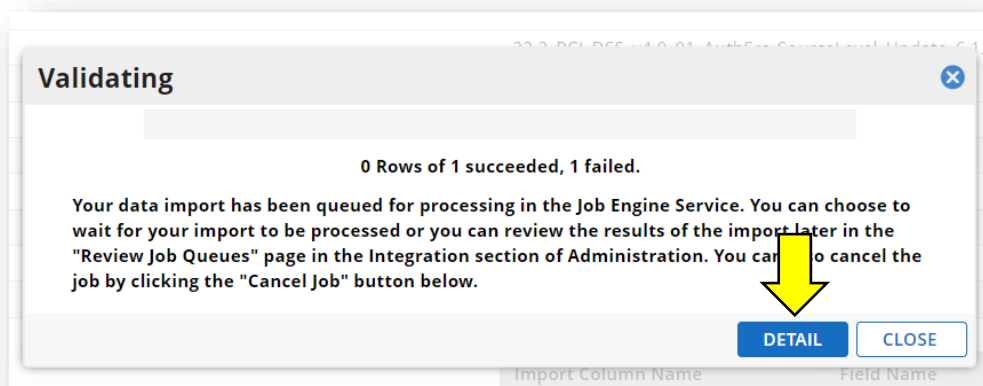
▼ CONTROL STANDARDS

Standard ID	Standard Name	Statement
<a href="#">ATCS-281</a>	Access Authorization Process	Company employees, contractors and service p have been assigned a valid User ID, may reques

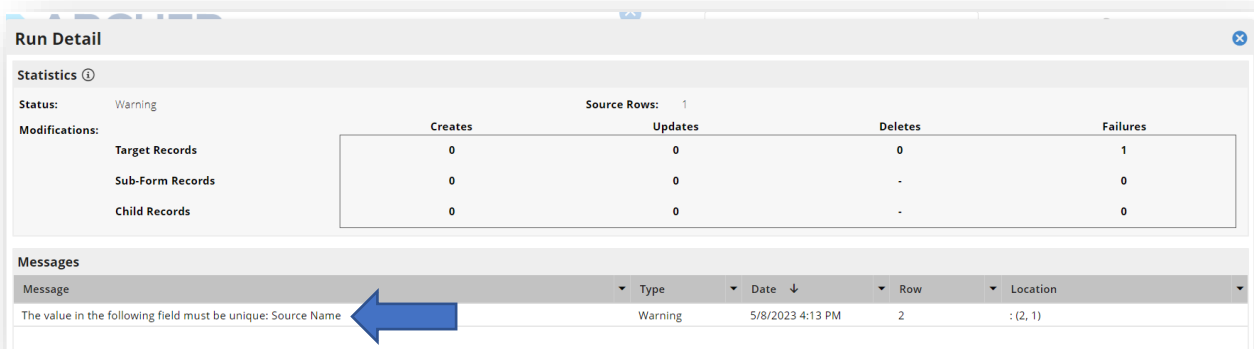
## Chapter 4: Troubleshooting

This section covers common troubleshooting scenarios when importing authoritative sources into Archer.

1. When importing content into Archer, you may encounter a notification that your import has failed. Select the **Detail** button to get more details about the specific type of failure.



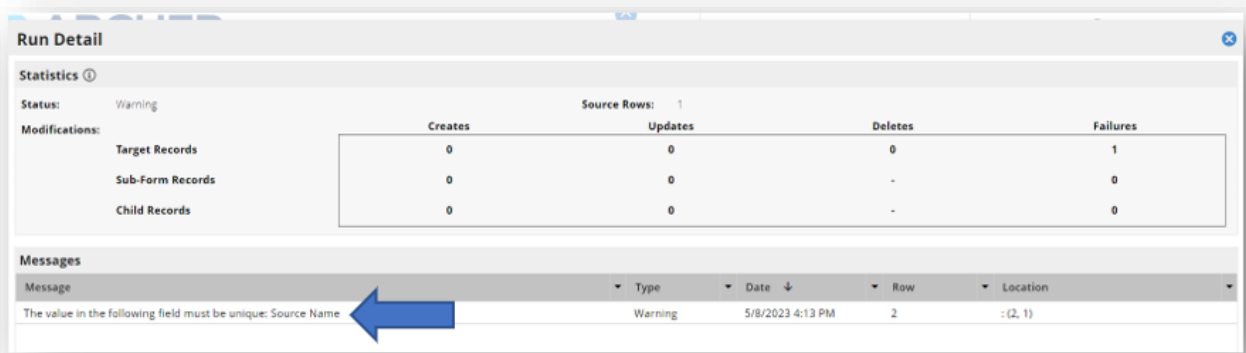
2. Next, a **Run Detail** report will display with additional information about the import error(s).



## Common Content Import Failure Errors

### Error: Field Not Unique

If the “field must be unique” appears this indicates that the file name already exists. This can happen at any level: Source, Topic, Section, or Sub Section.



**Run Detail**

Statistics ⓘ

Status: Warning

Source Rows: 1

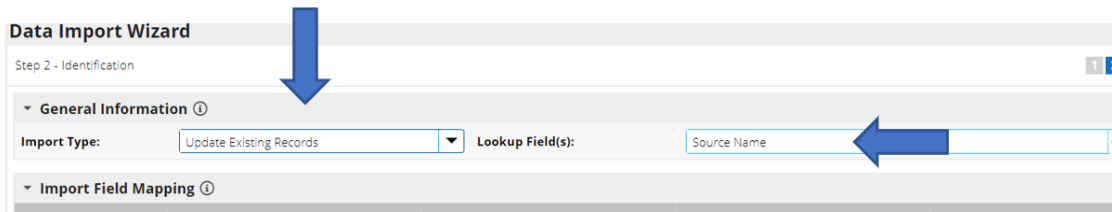
Modifications:

	Creates	Updates	Deletes	Failures
Target Records	0	0	0	1
Sub-Form Records	0	0	-	0
Child Records	0	0	-	0

Messages

Message	Type	Date ↓	Row	Location
The value in the following field must be unique: Source Name	Warning	5/8/2023 4:13 PM	2	:(2, 1)

To import this data correctly, go back through the import process, but in Step 2: select **Update Existing Records** and then the correct corresponding mapping as outlined in the [Update Content Import for Authoritative Sources](#) section of this document.



**Data Import Wizard**

Step 2 - Identification

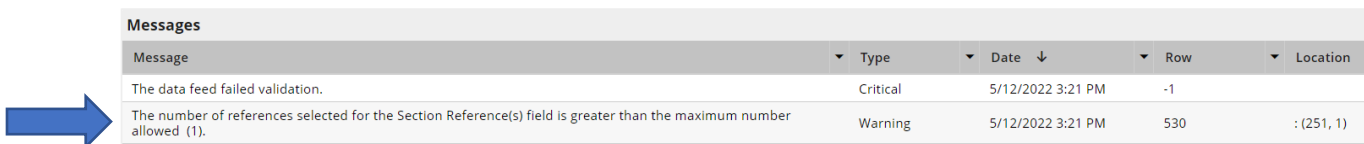
General Information ⓘ

Import Type: Update Existing Records

Lookup Field(s): Source Name

Import Field Mapping ⓘ

### Error: Number of Section Reference is greater than maximum number



**Messages**

Message	Type	Date ↓	Row	Location
The data feed failed validation.	Critical	5/12/2022 3:21 PM	-1	
The number of references selected for the Section Reference(s) field is greater than the maximum number allowed (1).	Warning	5/12/2022 3:21 PM	530	:(251, 1)

Here the data import needs correcting. If this happens, please reach out to your Archer Admin.


## Error: Field required



Messages					
Message	Type	Date ↓	Row	Location	
The data feed failed validation.	Critical	6/30/2022 7:34 PM	-1		
The Topic Reference(s) field is a required field.	Warning	6/30/2022 7:33 PM	1606	: (804, 1)	

Here the data import needs correcting. If this happens, please reach out to your Archer Admin.

## Error: Field exceeds the character limit



Messages					
Message	Type	Date ↓	Row	Location	
The data feed failed validation.	Critical	6/6/2022 8:23 PM	-1		
The text entered in the Section Description field exceeds the character limit (30000).	Warning	6/6/2022 8:23 PM	138	: (70, 1)	

Here the data import needs correcting. If this happens, please reach out to your Archer Admin.

## Error: Field is a required field



Messages					
Message	Type	Date ↓	Row	Location	
The data feed failed validation.	Critical	7/15/2022 3:05 PM	-1		
The Topic ID field is a required field.	Warning	7/15/2022 3:05 PM	126	: (64, 1)	
The Topic Name field is a required field.	Warning	7/15/2022 3:05 PM	126	: (64, 1)	

Here the data import needs correcting. If this happens, please reach out to your Archer Admin.