

# Archer Experts / Archer Scripts Group Management Tool & Utility

6.2 P2 HF1 & later

# RSA®

Developed By



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# Chapter 1: Overview of Archer Experts / Archer Scripts Group Management

## About Group Management

The Archer Experts / Archer Scripts Group Management tool & utility allows business users to manage the RSA Archer users that are assigned to Archer Groups. The Group Management tool & utility provides the ability for business managers to control, maintain and audit the RSA Archer user's holding permissions to their application(s). No longer is there a dependency on Archer Administrators to coordinate access for areas under their control. When realignment of human resources occur, managers can dynamically add and remove participants from group access thus maintaining the integrity of user access to critical company assets. The Group Management tool & utility contains built-in workflow with review frequency setting capability, last access data point for each user, and an audit trail of each change made to the group.

## Key Features

- **View All Users within your Groups** - From a single application screen you can view all the users with access to your Group(s). You can also monitor their use by viewing each user's Last Logon Timestamp.
- **Add Users to a Group** - With group ownership privileges you may now add users to your groups. This can be achieved on an individual basis or through a mass import of those users for which you wish to provide access.
- **Remove Users from a Group** - With group ownership privileges you may now remove users from your groups. This can be achieved on an individual basis or through a mass import of those users for which you wish to remove access.
- **Schedule Group Access Reviews** - Schedule regular reviews of group members to ensure only those with proper roles and responsibilities have access.

## Benefits

- Business Users can manage their own Archer permission groups and quickly see all users with access and last-time of access.
- Quickly adjust user access during turnover and re-organizations without Archer System Administrator involvement.
- Schedule regular reviews via automated campaigns to maintain the integrity of user access and prevent unauthorized use.
- Allows business users to manage groups for which they are assigned ownership.
- Reduces the workload for Archer System Administrators since they no longer have to manage the assignment of users to groups.
- Provides a bulk addition / removal feature to reduce the effort required to manage groups.

## Prerequisites

Components	Recommended Software
<b>On-Demand Application (ODA) License</b>	The Group Management tool & utility requires 1 ODA license.
<b>Operating System</b>	Windows Server 2012 R2
<b>Database Server</b>	Microsoft SQL Server 2014 (64-bit)
<b>Services Server</b>	Java Runtime Environment (JRE) 8 (64-bit)
<b>RSA Archer</b>	RSA Archer 6.2 P2 HF1 or later
<b>Use Cases</b>	All Use Cases

## Chapter 2: Group Management Components

### Applications

Application	Description
<b>Group Management</b>	The Group Management application allows a business user to manage the assignment of Archer Groups to Archer users.

### Levels

The Group Management tool & utility is a two (2) level application:

1. Level 1 (Group Management) stores the group information for each of the groups in the system.
2. Level 2 (Group Users Management) stores all history for group membership change requests.

### Data Feeds

The Group Management tool & utility employs three (3) data feeds in support of application functionality.

- **GM1—Create - Update All Groups:** This will run daily and is responsible for creating/updating group records for each of the groups found in the Archer database.
- **GM2—Populate Users:** This will run immediately following the GM1 data feed and is responsible for synchronizing group users between the system groups in the Archer database and the group records in the Group Management tool & utility.
- **GM3—Create Scheduled Reviews:** This will run daily immediately following the GM2 data feed against the Group Management tool & utility database. This data feed checks the “Next Review Date” field in all records. When the Next-Review-Date is equal to the current date a review record is created. A notification is sent to the Group Owner via email.

## Roles/Groups

- **GM:Admin** (same name for Roles/Groups) – access to all Group Management Records (level 1 and level 2). Users in this group have full Create, Read, Update, and Delete access on records regardless of the record status.
  - Note – Users assigned as Admins MUST be assigned the Archer out of the box “Access Control Administrator” role, otherwise the workflow cannot be completed. (An Admin executes the last step in the workflow).
- **GM:Users** (same name for Roles/Groups) – Users in this group can view all records in level 1. A user must be in this group to submit requests using the Group Management tool & utility.

### Notes:

- A user should not be placed in both the GM:Admin and GM:Users groups. It will not cause a problem if you do, but the best practice is not to have the same user in both groups.
- A user in either the GM:Admin or the GM:Users group should also be in the group that allows read access to the Business Unit application in the Business Hierarchy. Out of the box the default group is EM:Read Only. Failure to include the EM:Read Only group will prevent the display and selection of the Business Unit the level 1 Group record is associated with.

## Record Permissions:

- **Admins:** Create, Read, Update and Delete to both levels. They also approve the last step in the workflow.
- **Group Management Users:** Read access to level 1 records for all users assigned to Group GM:Users.
- **Group Users:** Contains the users who have been assigned to this Group. It is populated using a Data Feed and when the "add or remove" script is run from the 2nd level of this application.
- **Owners:** Read and Update to the level 1 record on which the user is listed.
- **Requester:** on the level 2 record and defaults to the level 2 Record Creator. Read and Update access to the level 2 record. The requester field is only presented when the request is of type “Request From User”.
- **Reviewer:** On the level 2 record and inherits from Owners on the level 1 record. The requester field is only presented when the request is of type “Request From User”.

## Group Management Change Types

- **Request From User:** initiated when a User in the GM:Users group requests a change (addition or removal). This is the only scenario which uses the Requester / Reviewer workflow on the level 2 Group Users Management record.
- **Owner Change:** initiated when the Owner requests a change (addition or removal).
- **Scheduled Review:** initiated when the current date equals the “Next Review Date” on the level 1 record.

## Data Field Descriptions

### Group Management Main Screen

**Asset Catalog Administrator** Group Management

First Published: 9/12/18 10:00 PM Last Updated: 9/30/18 3:21 PM

SAVE SAVE AND CLOSE EDIT DELETE RELATED RECALCULATE EXPORT PRINT EMAIL ACCESS

**▼ GROUP INFORMATION**

Group Name: Asset Catalog Administrator  
 Group Created By: Administrator, System  
 GUID: 44690160-29e2-4b31-8c99-68cb5f0d014a  
 Member Of:  
 Description: The Asset Catalog Administrator group is for users who have full administrative access to the following core applications: Applications, Devices, Storage Devices, Technologies, Business Processes, Corporate Objectives, Products and Services, Information Assets, Facilities, and Contacts.

Group ID: 141  
 Group Created Date: 3/2/16  
 Group Status: Active  
 Members (Groups):

**▼ USERS**

Group Users: Berkowitz, Jeff  
 Blood, Paul  
 Bowers, Brandon  
 Feed, Review  
 Gao, Feng

Group Users Status: Berkowitz, Jeff (jberkowitz) [Archer Experts] [active] [Last Login: Sep 30 2018 7:20PM UTC]  
 Blood, Paul (pblood) [] [active] [Last Login: Sep 26 2018 6:26PM UTC]  
 Bowers, Brandon (bbowers) [] [active] [Last Login: Sep 28 2018 5:45PM UTC]  
 Feed, Review (reviewfeed) [] [active] [Last Login: Sep 30 2018 7:21PM UTC]  
 Gao, Feng (fenggao) [] [active] [Last Login: Sep 12 2018 11:43PM UTC]

**▼ GROUP OWNERSHIP**

Business Unit: Owners: owner, oda

**▼ REVIEW**

Frequency of Review: Monthly  
 Last Review Date: 8/14/18  
 Next Review Date: 9/13/18

**▼ GROUP USERS MANAGEMENT**

GUM ID	Change Type	Users to Add	Users to Remove	Import Users to Add	Import Users to Remove	Status	Requester
<a href="#">GUM-148</a>	Owner Change					Open	owner, oda
<a href="#">GUM-147</a>	Owner Change		Creator, Exception			Closed	owner, oda
<a href="#">GUM-146</a>	Owner Change	Creator, Exception Feed, Review	Gearity, Rich			Closed	owner, oda

[Add New](#)

SCREEN SECTION	FIELD NAME	DESCRIPTION
Group Information	Group Name	Name of the group.
	Group Created By	The user who created the group.
	GUID	The GUID generated by the system.
	Member Of	The parent group.
	Group ID	System generated ID.
	Group Created Date	Date the group is created.
	Group Status	The status of the group – active or inactive.
	Description	The description of the group.
Users	Group Users	The users (members) of the group.
	Group Users Status	This field pulls the list of users associated with the group along with the user status, the Company, and the timestamp of the last logon date.
Group Ownership	Business Unit	The business unit that owns this group.
	Group Owners	The owner of the group. Users in this field have edit rights.
Review	Frequency of Review	The frequency you want to set for the group review.
	Last Review Date	The last review date.
	Next Review Date	The date of next scheduled review, it is determined by the frequency and the Last Review Date.
	GUM ID	Group user management ID. System generated.

SCREEN SECTION	FIELD NAME	DESCRIPTION
Group User Management	Change Type	The type of change: Scheduled Review (automatically created), Request From User, or Owner Change.
	Users to Add / Import Users To Add	The users to be added to the group.
	Users to Remove / Import Users To Remove	The users to be removed from the group.
	Status	The status of this change request.
	Requestor	The requestor for the change.

## Group Management Update Screen

**GUM-148** Group Management

SAVE SAVE AND CLOSE VIEW DELETE

EXPORT PRINT EMAIL ACCESS

First Published: 9/30/18 3:29 PM Last Updated: 9/30/18 3:29 PM

**GENERAL INFORMATION**

GUM ID: GUM-148 Status: Open

Change Type: Owner Change

**▼ GROUP INFORMATION**

Group Name	Group ID	Owners	Group Users	Group Users Status	Description	System ID
Asset Catalog Administrator	141	owner, oda	Berkowitz, Jeff Blood, Paul Bowers, Brandon Feed, Review Gao, Feng	Berkowitz, Jeff (berkowitz) [Archer Experts] [active] [Last Login: Sep 30 2018 7:20PM UTC] Blood, Paul (pblood) [active] [Last Login: Sep 26 2018 6:26PM UTC] Bowers, Brandon (bbowers) [active] [Last Login: Sep 28 2018 5:45PM UTC] Feed, Review (reviewfeed) [active] [Last Login: Sep 30 2018 7:21PM UTC] Gao, Feng (fenggao) [active] [Last Login: Sep 12 2018 11:43PM UTC]	The Asset Catalog Administrator group is for users who have full administrative access to the following core applications: Applications, Devices, Storage Devices, Technologies, Business Processes, Corporate Objectives, Products and Services, Information Assets, Facilities, and Contacts.	747778

**▼ REQUEST**

Users to Add: ... Users to Remove: ...

Import Users to Add: Add Import Users to Remove: Add

Business Justification:

**▼ WORKFLOW**

Require Group Owner Review?: No

Owner Action: ☐ Notify Admin for Execution

**▼ EXECUTION LOG**

Execution Log:

**▼ ATTACHMENT**

Name	Size	Type	Upload Date	Downloads	History
No Records Found					

[Add New](#)

Required

SCREEN SECTION	FIELD NAME	DESCRIPTION
General Information	GUM ID	Group user management ID. System generated.
	Change Type	The type of change: Scheduled Review (automatically created), Request From User, or Owner Change.
	Status	The status of this change request.
Group Information	Group Name	Name of the group.
	Group ID	System generated ID.
	Group Owners	The owner of the group. Users in this field have edit rights.



SCREEN SECTION	FIELD NAME	DESCRIPTION
	Group Users	The users (members) of the group.
	Group Users Status	This field pulls the list of users associated with the group along with the user status, the Company, and the timestamp of the last logon date.
	Description	The description of the group.
	System ID	Used by API script. Do not remove.
Request	Users to Add	The users to be added to the group.
	Import Users to Add	Bulk group member upload. This is an attachment field, you can add user names in the first column of a CSV file and attach to this field to upload the users to the group.
	Business Justification	The business justification of the request.
	Users to Remove	The users to be removed from the group.
	Import Users to Remove	Bulk group member removal. This is an attachment field, you can add user names in the first column of a CSV file and attach to this field to remove the users from the group.
Workflow	Require Review	Whether the request requires a review by the Group Owner. Note – this value is automatically set to Yes if the change type is “Request From User”. If the change type is not “Request From User”, then this value is set to No and workflow approval by the Group Owner is not required. If Yes, a review by the Group Owner is needed. Note that for all changes a Group Management Admin is involved as the last step in the workflow as they are the only users authorized to execute the script that invokes the Archer APIs to makes the changes to Group assignments.
	Requestor	The requestor for the change. Only displayed if the change type is “Request From User”.
	Reviewer	The reviewer of the request. Only displayed if the change type is “Request From User”.
	Submission Status	The submission status of the request – “In Process” or “Submitted”.
	Submit Date	The date the request is submitted for review.
	Review Status	The status of the review: “Approved”, “Awaiting Review”, or “Rejected”.
	Review Date	The date the review is conducted.
Scripts	Perform User Addition And Removal	This button triggers APIs and adds or removes users to / from the group, and then updates the corresponding group management record.
Attachment	Name	Attachment name.
	Size	Attachment size.
	Type	Attachment type.
	Upload Date	Attachment upload date.

**Note:** A section called “Execution Log” has been added after the Script section to keep a log of messages issued when changes have been processed. The log captures errors, warnings, and successes, and it will remain on each Level 2 (Group Users Management) record. An example is included here:

▼ SCRIPTS

▼ EXECUTION LOG

Execution Log:

Action Time: 2/27/2018 2:40:31 PM

User Name	User ID	Source	Action	Status	Message
odauserT1		Uploaded File	add	error	User Unrecognized
odauserT1		Uploaded File	remove	error	User Unrecognized
Berkowitz, Jeff	209	User Selector	add	success	
odauser	244	Uploaded File	add	success	
Blackburn, Christine	202	User Selector	remove	warning	User Not In Group
odauser	244	Uploaded File	remove	warning	User Not In Group

▼ ATTACHMENT

Name	Size	Type	Upload Date
No Records Found			

## Chapter 3: Installing Group Management

### Installation Overview

Complete the following tasks to install the application.

Task	Steps
1. Prepare for the installation	<ol style="list-style-type: none"> <li>1. Ensure that your RSA Archer GRC system meets the following requirements: <ul style="list-style-type: none"> <li>• RSA Archer GRC Platform version 6.2 P02 HF01 or later.</li> </ul> </li> <li>2. Go to the RSA Archer Exchange, (<a href="https://community.rsa.com/community/products/archer-grc/archer-61/downloads">https://community.rsa.com/community/products/archer-grc/archer-61/downloads</a>) to obtain information on how to download the Entitlement Management Application Pack directly from Archer Scripts/Archer Experts along with supporting documentation (you may be required to sign up or login in).</li> <li>3. Read and understand the "Packaging Data" section of the RSA Archer GRC Online Documentation.</li> </ol>
2. Install the package.	Installing a package requires that you import the package file, map the objects in the package to objects in the target instance, and then install the package. See <a href="#">Installing the Application Package</a> for complete information.
3. Set up Data Feeds.	You must import and schedule each use case data feed that you want to use. See <a href="#">Setting Up Data Feeds</a> for complete information.

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4. Test the installation.

Test the application according to your company standards and procedures, to ensure that the use case works with your existing processes.

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## Installing the Application Package

### Task 1: Back Up Your Database

There is no Undo function for a package installation. Packaging is a powerful feature that can make significant changes to an instance. RSA strongly recommends backing up the instance database before installing a package. This process enables a full restoration if necessary.

An alternate method for undoing a package installation is to create a package of the affected objects in the target instance before installing the new package. This package provides a snapshot of the instance before the new package is installed, which can be used to help undo the changes made by the package installation. New objects created by the package installation must be manually deleted.

### Task 2: Import the Package

Go to the RSA Archer Exchange, (<https://community.rsa.com/community/products/archer-grc/archer-61/downloads>) to obtain information on how to download the Entitlement Management Application Pack directly from Archer Scripts/Archer Experts along with supporting documentation (you may be required to sign up or login in). Please ensure you are properly licensed to use the Application Package and any dependent Use Cases.

### Procedure

From the Main Menu, navigate to the Administration Page by clicking on the down arrow to the right of the Tool Icon. Then select Install Packages under Application Builder. Click on Import and select the Group Management package file.

## Archer Experts / Archer Scripts Group Management Tool & Utility

**Administration**

- Access Control
- Advanced Workflow
- Appearance
- Application Builder
  - Solutions
  - Applications
  - Questionnaires
  - Sub-Forms
  - Global Values Lists
  - Packages
  - Install Packages
  - View Application Builder Reports
- Discussion Forums
- Globalization
- Integration
  - Data Feeds
  - Data Publications
  - Data Imports
  - Review Job
- Queues
  - Obtain API
- Resources
- Management Reporting

**Import and Install Packages**

Available Packages | Package Mapping Log | Package Installation Log

**Available Packages** | Import |

The packages listed below are available for installation. During the install process, you can customize the components to be installed.

Drag a column name here to group the items by the values within that column.

Name	Date Packaged	Prepared By	Archer System Version	Imported Date	Imported By	Actions
<u>Group Management</u>	10/2/2017 3:12 PM	RSA Archer eGRC Platform	6.2.500.1018	10/2/2017 4:07 PM	Administrator, System	[Icons]
<u>Group Management</u>	8/1/2017 3:08 PM	RSA Archer eGRC Platform	6.2.301.1003	8/1/2017 3:36 PM	Administrator, System	[Icons]
<u>Group Management ODA</u>	5/4/2017 11:04 AM	Archer Experts Archer GRC	5.5.40500.1011	5/4/2017 11:09 AM	Administrator, System	[Icons]
<u>Data Feed</u>	12/13/2016 7:55 PM	Sandbox	5.5.40000.1110	12/13/2016 8:51 PM	Administrator, System	[Icons]
<u>Group Mgt &amp; Data Feed 11/6/2016</u>	11/16/2016 8:26 PM	Sandbox	5.5.40000.1110	11/17/2016 2:22 PM	Administrator, System	[Icons]
<u>workspace</u>	10/18/2016 4:36 PM	Sandbox	5.5.40000.1110	10/18/2016 4:45 PM	Administrator, System	[Icons]
<u>workspace</u>	10/18/2016 4:21 PM	Sandbox	5.5.40000.1110	10/18/2016 4:31 PM	Administrator, System	[Icons]
<u>ODAs</u>	10/18/2016 1:55 PM	Sandbox	5.5.40000.1110	10/18/2016 3:58 PM	Administrator, System	[Icons]
<u>workspace</u>	9/21/2016 4:04 PM	Sandbox	5.5.40000.1110	9/21/2016 4:07 PM	Administrator, System	[Icons]
<u>ODAs</u>	9/13/2016 9:28 PM	Sandbox	5.5.40000.1110	9/14/2016 7:53 PM	Administrator, System	[Icons]

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After the package is imported, click on it, which will bring you to the detail page, then click Map (see next page).

**Package Import Details: Group Management**

Map | Install | Delete | Download | Email

**General Information**

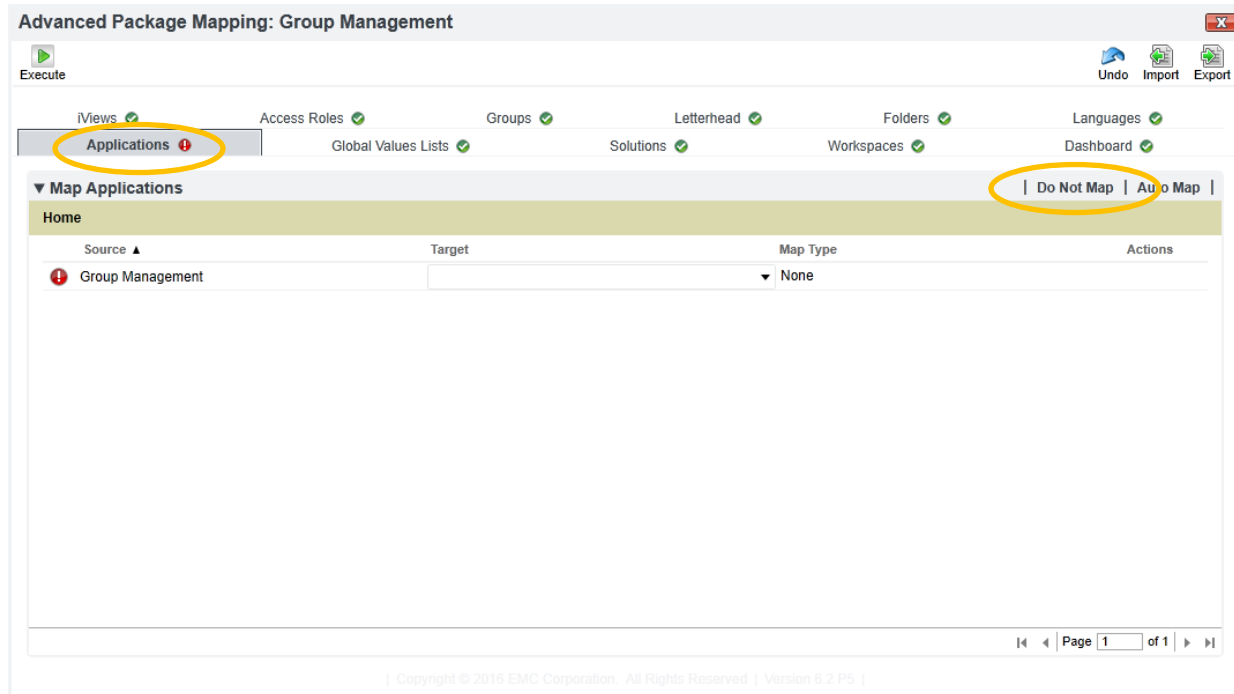
Name:	Group Management	Prepared By:	RSA Archer eGRC Platform
Type:	Package	Archer System Version:	6.2.500.1018
Description:			
Date Packaged:	10/2/2017 3:12 PM	Imported By:	Administrator, System 10/2/2017 4:07 PM

**Components**

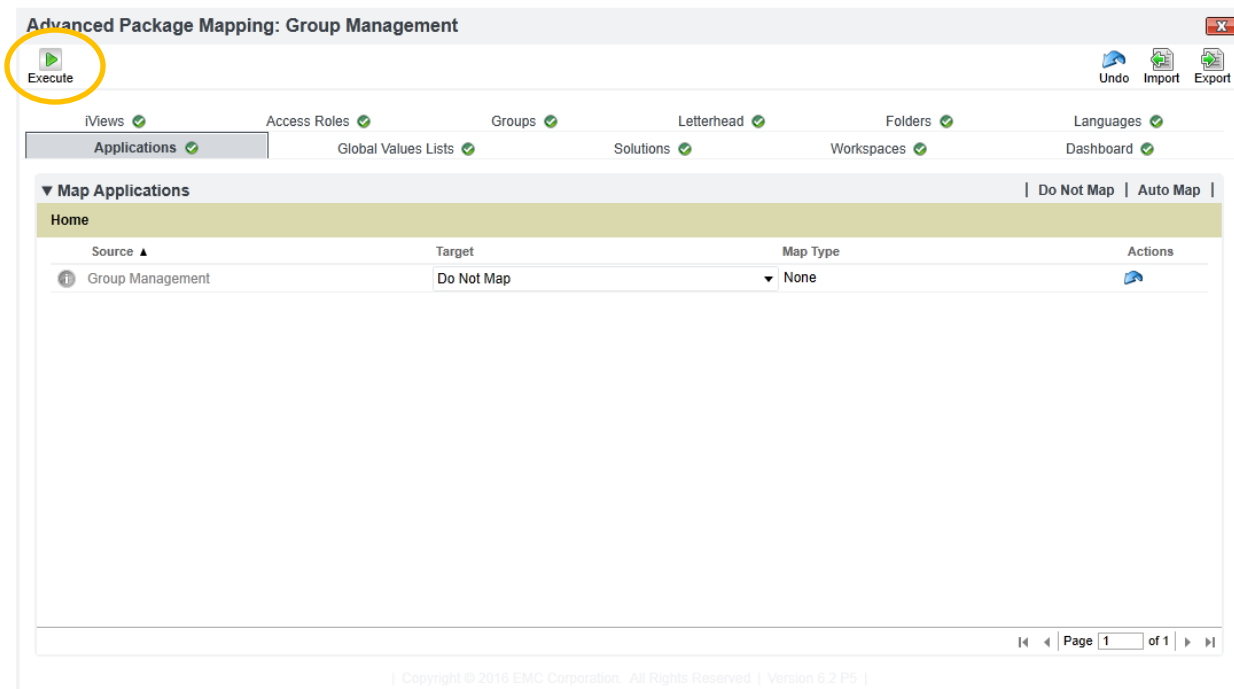
View the details for the components included in the package.

Name	Type	Status
<input type="checkbox"/> Access Role		
GM: Admins	Access Role	Active
GM: Users	Access Role	Active
<input type="checkbox"/> Application		
Group Management	Application	Active in Development
<input type="checkbox"/> Dashboard		
Group Management	Dashboard	Active
<input type="checkbox"/> Language		
English	Language	Active
<input type="checkbox"/> Report		

In the mapping page, click into each tab with the red exclamation mark, and click “Do Not Map”. You will see the red exclamation mark turn to a green check. Do this until all the tabs show a green check.



After all Tabs have a green check mark, click Execute. You will see a warning message stating, “All current mappings have “Do Not Map” selected”. Click “Yes”.



You will be brought back to the detail page. Click on Install. You will see a warning message stating, “It is strongly recommended to verify that all objects in the package are correctly mapped before installing the package. Are you sure that you want to continue?” Click “OK”.

**Package Import Details: Group Management**

Map **Install** Delete Download Email

**General Information**

Name:	Group Management	Prepared By:	RSA Archer eGRC Platform
Type:	Package	Archer System Version:	6.2.500.1018
Description:			
Date Packaged:	10/2/2017 3:12 PM	Imported By:	Administrator, System 10/2/2017 4:07 PM

**Components**

View the details for the components included in the package.

Type x

Name	Type	Status
<input type="checkbox"/> Access Role		
GM: Admins	Access Role	Active
GM: Users	Access Role	Active
<input type="checkbox"/> Application		
Group Management	Application	Active in Development
<input type="checkbox"/> Dashboard		
Group Management	Dashboard	Active
<input type="checkbox"/> Language		
English	Language	Active
<input type="checkbox"/> Report		

Make sure all the component types are checked and click on “Install” in the next page. When prompted, check the checkbox and click “OK”.

**Install Package: Group Management**

**Install** Email

**General Information**

Name:	Group Management	Prepared By:	RSA Archer eGRC Platform
Type:	Package	Archer System Version:	6.2.500.1018
Description:			
Date Packaged:	10/2/2017 3:12 PM	Imported By:	Administrator, System 10/2/2017 4:07 PM

**Post Install Actions**

☐ Deactivate target fields and data-driven events that are not in the package

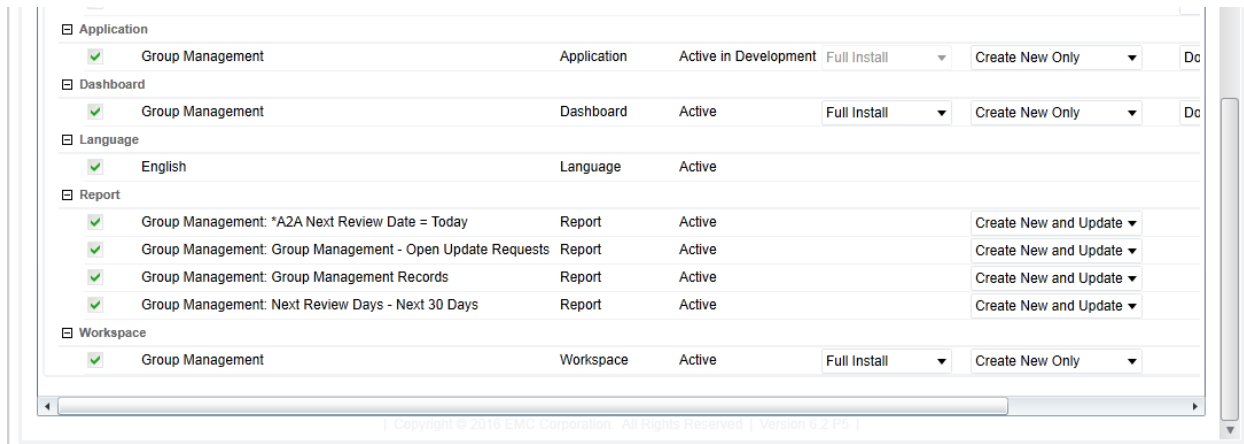
**Configuration**

Select the components you wish to install from the package.

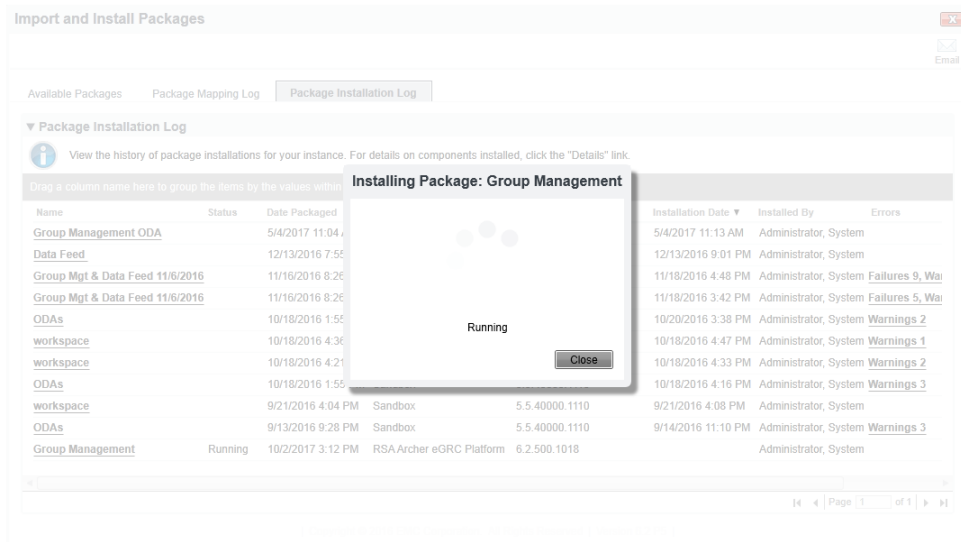
Type x

	Name	Type	Status	Translation Option	Install Method	Ins
<input type="checkbox"/> Access Role						
<input checked="" type="checkbox"/>	GM: Admins	Access Role	Active			Ov
<input checked="" type="checkbox"/>	GM: Users	Access Role	Active			Ov

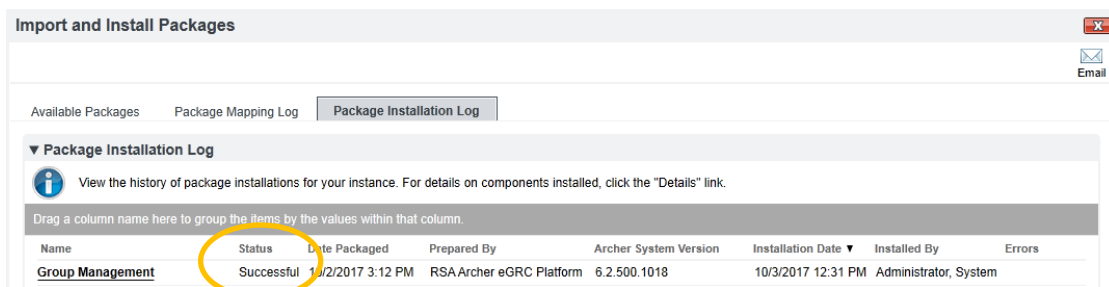
## Archer Experts / Archer Scripts Group Management Tool & Utility



The installation will take place and will take a few minutes.

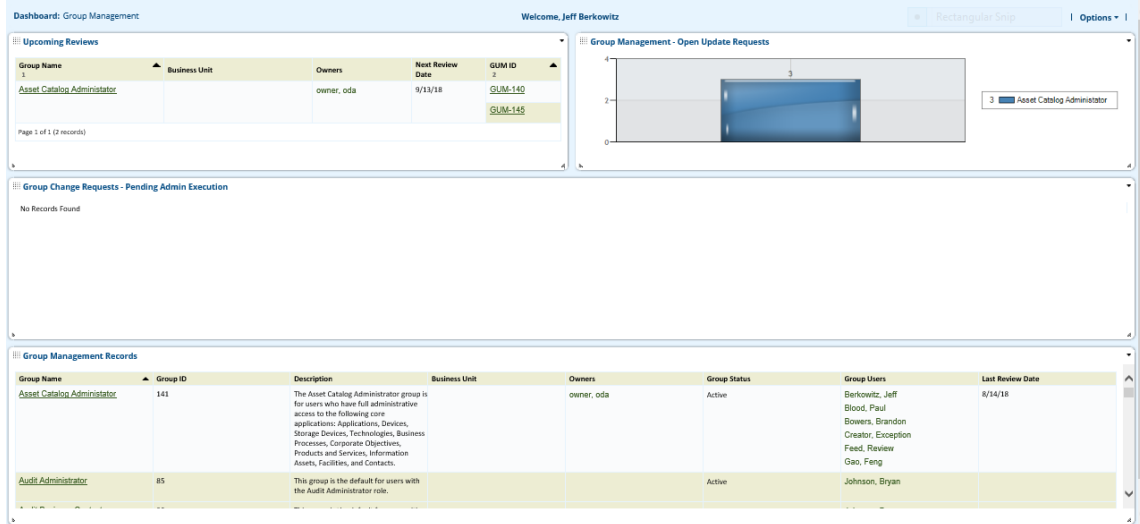


You should expect to see a “Successful” status once done. You can ignore any warnings.



After you refresh your page (or logoff and login), you should see the new Group Management workspace. Note – you will not see any content on the Group Management Dashboard until the Data Feeds (which are described later in this document) have been installed and are running.

## Archer Experts / Archer Scripts Group Management Tool & Utility



## Setting up Data Feeds

Navigate to the Administration Page by clicking on the down arrow to the right of the Tool Icon. Then select Data Feeds under Integration. Click Import and import the three Group Management tool & utility feeds (you will need to import and update each one at a time).

- GM1 – Create Update All Groups.dfx5
- GM2 – Populate Users.dfx5
- GM3 – Create Scheduled Reviews.dfx5

The screenshot shows the Archer Administration page with the 'Manage Data Feeds' section active. The left sidebar lists various administration options, including 'Integration' and 'Data Feeds'. The main content area displays a table of data feeds with columns: Name, Started, Completed, Scheduled, Active, Last Updated, and Updated By. The table lists various data feeds, including 'Audit\_Audit Entities Relationship\_1 (Minute Schedule)', 'Audit\_Audit Entities Relationship\_2', 'Audit\_Audit Entities Relationship\_3', 'Audit\_Audit Entities Relationship\_4', 'Audit\_Audit Entity Historical Content (Minute Schedule)', 'Audit\_Clear Additional Library Link', 'Audit\_Create Additional Audit Workpapers (Minute Schedule)', 'Audit\_Create Audit Workpapers By Audit Program (Minute Schedule)', 'Audit\_Link Audit Engagements to Audit Plans (Minute Schedule)', 'Audit\_Scope Audit Entities 1 (Minute Schedule)', 'Audit\_Scope Audit Entities 2', 'Audit\_Scope Audit Entities 3', 'IBCM\_BCM Crisis Activate Plans (Minute Schedule)', 'IBCM\_BCM Test Exercise Activate Plans (Minute Schedule)', 'ICM\_Compliance History Feed', 'IRM\_Business Unit Risk Review', 'ISECOPS\_Security Operations - Generate Breach Tasks (Minute Schedule)', 'ISECOPS\_Security Operations - Generate Incident Response Procedures and Tasks (Minute Schedule)', 'ISECOPS\_Security Operations - Not Applicable Breach Tasks (Minute Schedule)', and 'ISECOPS\_Security Operations - Not Applicable Incident Response Procedures and Tasks (Minute Schedule)'. The table also includes a 'Manage Data Feeds' section with a description and a table of data feeds.

Name	Started	Completed	Scheduled	Active	Last Updated	Updated By
Audit_Audit Entities Relationship_1 (Minute Schedule)	12/6/16 11:12 AM	12/6/16 11:14 AM	5/3/17 6:09 PM		12/6/16 2:25 PM	Bowers, Brandon
Audit_Audit Entities Relationship_2	12/6/16 11:08 AM	12/6/16 11:08 AM		✓	12/6/16 2:25 PM	Bowers, Brandon
Audit_Audit Entities Relationship_3	12/6/16 11:08 AM	12/6/16 11:08 AM		✓	12/6/16 2:25 PM	Bowers, Brandon
Audit_Audit Entities Relationship_4	12/6/16 11:08 AM	12/6/16 11:08 AM		✓	12/6/16 11:08 AM	Data Feed Service, Audit_Entity
Audit_Audit Entity Historical Content (Minute Schedule)	12/6/16 2:22 PM	12/6/16 2:22 PM	5/3/17 6:10 PM		12/6/16 2:26 PM	Bowers, Brandon
Audit_Clear Additional Library Link	5/2/17 6:08 PM	5/2/17 6:08 PM	5/3/17 6:08 PM	✓	5/2/17 6:08 PM	Data Feed Service, Clear_Addit
Audit_Create Additional Audit Workpapers (Minute Schedule)	12/6/16 2:24 PM	12/6/16 2:25 PM	5/3/17 6:08 PM		12/6/16 2:26 PM	Bowers, Brandon
Audit_Create Audit Workpapers By Audit Program (Minute Schedule)	12/6/16 2:25 PM	12/6/16 2:26 PM	5/3/17 6:09 PM		12/6/16 2:27 PM	Bowers, Brandon
Audit_Link Audit Engagements to Audit Plans (Minute Schedule)	12/6/16 2:22 PM	12/6/16 2:22 PM	5/3/17 6:11 PM		12/6/16 2:27 PM	Bowers, Brandon
Audit_Scope Audit Entities 1 (Minute Schedule)	12/6/16 2:25 PM	12/6/16 2:25 PM	5/3/17 6:08 PM		12/6/16 2:27 PM	Bowers, Brandon
Audit_Scope Audit Entities 2	12/6/16 2:25 PM	12/6/16 2:25 PM		✓	12/6/16 2:27 PM	Bowers, Brandon
Audit_Scope Audit Entities 3	12/6/16 2:25 PM	12/6/16 2:26 PM		✓	12/6/16 2:26 PM	Data Feed Service, Scope_Audit
IBCM_BCM Crisis Activate Plans (Minute Schedule)	12/6/16 2:26 PM	12/6/16 2:27 PM	5/3/17 6:10 PM		12/6/16 2:28 PM	Bowers, Brandon
IBCM_BCM Test Exercise Activate Plans (Minute Schedule)	12/6/16 2:27 PM	12/6/16 2:27 PM	5/3/17 6:10 PM		12/6/16 2:28 PM	Bowers, Brandon
ICM_Compliance History Feed	3/4/17 7:00 PM	3/4/17 7:00 PM	6/3/17 7:00 PM	✓	3/4/17 7:00 PM	Data Feed Service, Archer
IRM_Business Unit Risk Review	4/1/17 7:00 PM	4/1/17 7:00 PM	7/1/17 7:00 PM	✓	4/1/17 7:00 PM	Data Feed Service, Archer
ISECOPS_Security Operations - Generate Breach Tasks (Minute Schedule)	12/6/16 2:27 PM	12/6/16 2:27 PM	5/3/17 6:07 PM		12/6/16 2:28 PM	Bowers, Brandon
ISECOPS_Security Operations - Generate Incident Response Procedures and Tasks (Minute Schedule)	12/14/16 6:24 PM	12/14/16 6:24 PM	5/3/17 6:07 PM		12/14/16 6:24 PM	Bowers, Brandon
ISECOPS_Security Operations - Not Applicable Breach Tasks (Minute Schedule)	10/14/16 5:57 PM				12/6/16 2:29 PM	Bowers, Brandon
ISECOPS_Security Operations - Not Applicable Incident Response Procedures and Tasks (Minute Schedule)	12/6/16 2:28 PM	12/6/16 2:28 PM	5/3/17 6:07 PM		12/6/16 2:29 PM	Bowers, Brandon



For data feeds GM1 and GM2, please perform the following configuration changes based on your environment information.

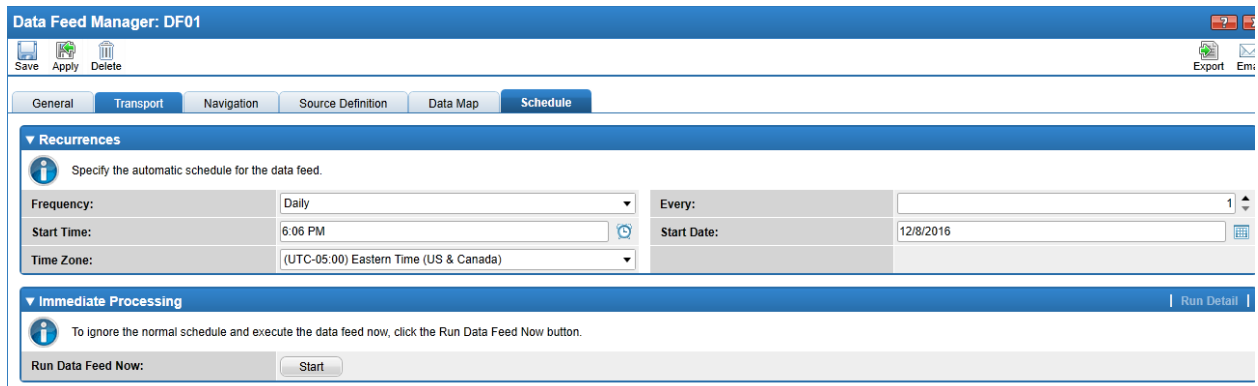
1. Under the General tab, set status to active.

The screenshot shows the 'Data Feed Manager: DF01' window with the 'General' tab selected. The 'Status' dropdown menu is highlighted with a yellow circle and set to 'Active'. Other fields include Name: DF01, Alias: DF01, ID: {2086A073-2D1E-46FE-8407-5ED56449FB24}, and Description: Takes all feed from database... The 'Created By' and 'Last Updated' fields both show 'Gao, Feng 12/11/2016 10:55:03 PM' and '12 PM' respectively.

2. Under the Transport tab, do the following:
  - a. Replace “PutYourDatabaseServerNameHere” underlined in the screenshot to your database server name (without quotes).
  - b. Replace “PutYourArcherInstanceDatabaseNameHere” underlined in the screenshot to your Archer Instance database name (without quotes).
  - c. Replace User Name with a SQL account that has database DB Owner access.
  - d. Enter Password. **Note – the password must contain a special character such as an exclamation mark, otherwise some feeds might run continuously (this is an Archer software defect).**

The screenshot shows the 'Data Feed Manager: DF01' window with the 'Transport' tab selected. The 'Transport Method' is set to 'Database Query Transporter'. The 'Database Configuration' section is expanded, showing the 'Provider' as 'SqClient Data Provider' and 'Connection Timeout' as '60 seconds'. The 'Connection String' is 'Data Source=PutYourDatabaseServerNameHere;Initial Catalog=PutYourArcherInstanceDatabaseNameHere;UID=(username);PWD=(password)'. The 'User Name' is 'Archer1' and the 'Password' is masked with dots. The 'Query' field contains a complex SQL statement.

3. Under the Schedule Tab, set a schedule for the first data feed (GM1) that best fits your environment. The schedule for the 2<sup>nd</sup> data feed is a reference, so no change is required under the Schedule Tab for the 2<sup>nd</sup> data feed.



**Data Feed Manager: DF01**

Save Apply Delete Export Em

General Transport Navigation Source Definition Data Map **Schedule**

**▼ Recurrences**

Specify the automatic schedule for the data feed.

Frequency: Daily Every: 1  
 Start Time: 6:06 PM Start Date: 12/8/2016  
 Time Zone: (UTC-05:00) Eastern Time (US & Canada)

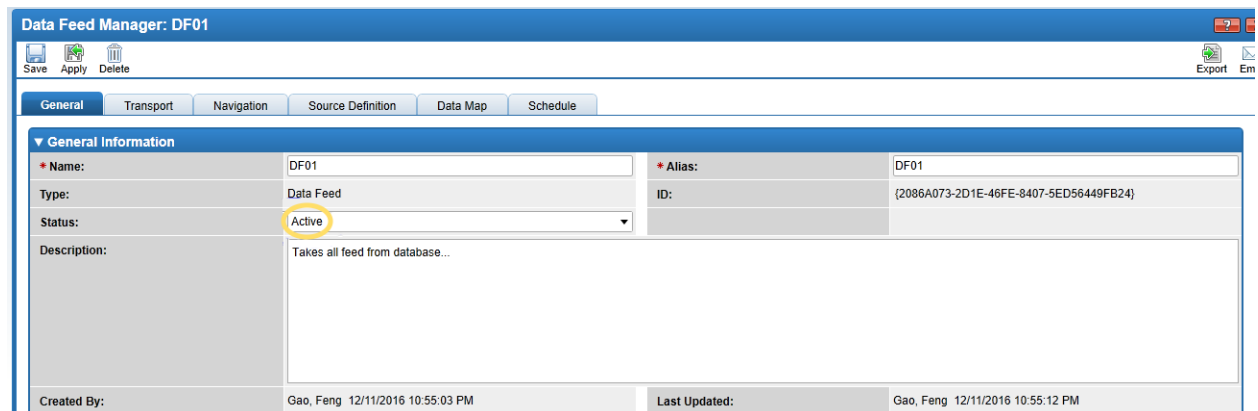
**▼ Immediate Processing** | Run Detail |

To ignore the normal schedule and execute the data feed now, click the Run Data Feed Now button.

Run Data Feed Now: Start

For data feed GM3, please perform the following configuration changes based on your environment information.

1. Under the General tab, set status to active.



**Data Feed Manager: DF01**

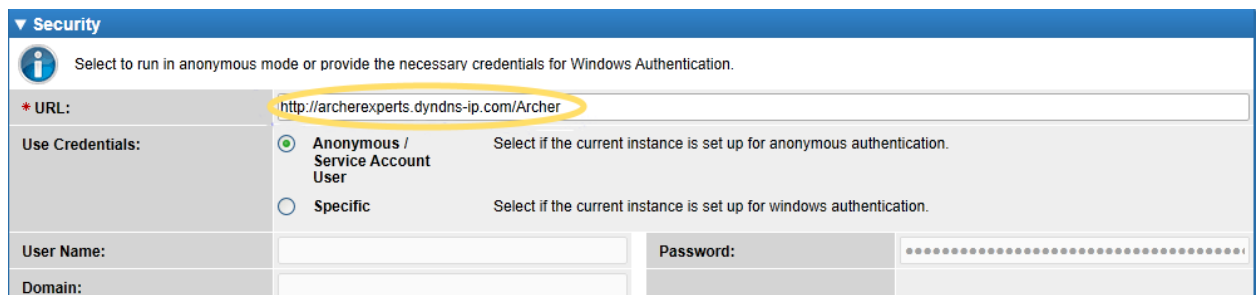
Save Apply Delete Export Em

General Transport Navigation Source Definition Data Map Schedule

**▼ General Information**

\* Name: DF01 \* Alias: DF01  
 Type: Data Feed ID: (2086A073-2D1E-46FE-8407-5ED56449FB24)  
 Status: **Active**  
 Description: Takes all feed from database...  
 Created By: Gao, Feng 12/11/2016 10:55:03 PM Last Updated: Gao, Feng 12/11/2016 10:55:12 PM

2. Under the Transport tab, do the following:
  - a. Replace the URL with the URL of the Archer instance.
  - b. Replace the User Name with an Archer userid that has sysadmin authority. **Note – if possible use a Userid that has a non-expiring password.**
  - c. Replace the Password with the password of the Archer Userid entered into the User Name field.



**▼ Security**

Select to run in anonymous mode or provide the necessary credentials for Windows Authentication.

\* URL: http://archerexperts.dyndns-ip.com/Archer  
 Use Credentials:  
☒ Anonymous / Service Account User Select if the current instance is set up for anonymous authentication.  
☐ Specific Select if the current instance is set up for windows authentication.  
 User Name: Password:   
 Domain:

Transport Configuration			
Provide the credentials for the data feed to access the RSA Archer Web Services API and retrieve data from this or another instance of the RSA Archer GRC Platform.			
Search Type:	Report ID	* Report:	9AC6CA32-5EB9-4EBC-A5B4-B56785A47AC4
Security:	<input type="checkbox"/> Use Windows Authentication	Report Name:	*A2A Next Review Date = Today
* User Name:	reviewfeed	* Password:	*****
Domain:			
* Instance:	Archer		

The schedule for the 3<sup>rd</sup> data feed is a reference, so no change is required under the Schedule Tab for the 3<sup>rd</sup> data feed.

## Chapter 4: Using Group Management

### Working with Group Management

#### Accessing Group Management

1. Sign into Archer using your User Login credentials.

2. When successfully signed you, you'll land on a main navigation panel with a menu bar similar to this:

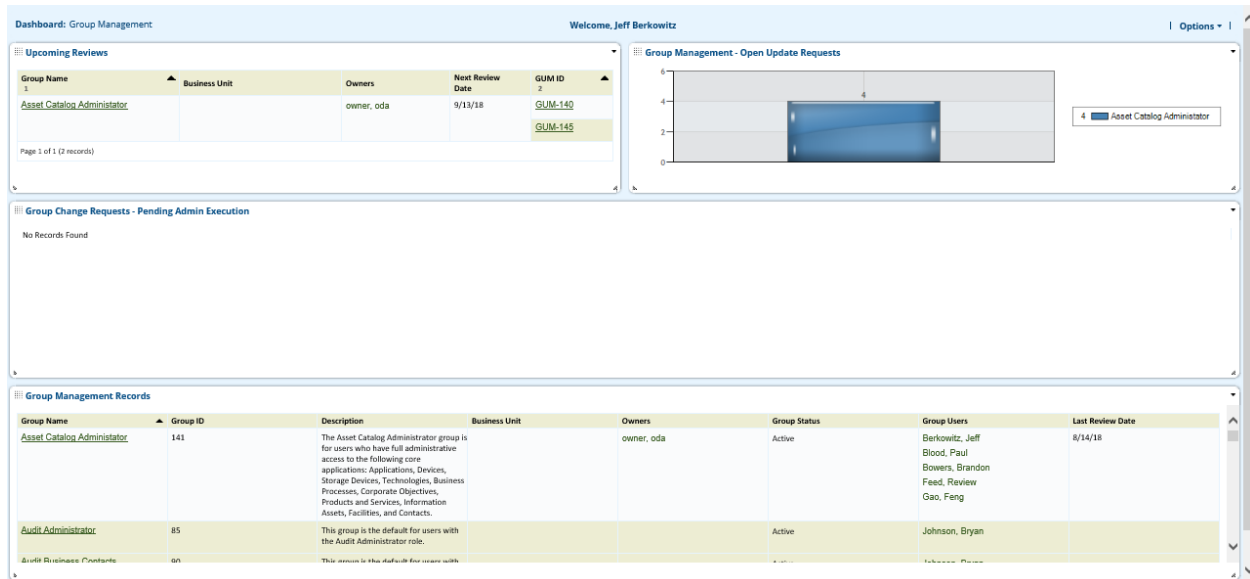
3. If you do not see the Group Management TAB, click on the “SHOW ALL” TAB. When the Group Management option is visible, click on it to enter the tool & utility.

## Group Management Workspace

Upon entering the Group Management tool & utility you will see the main Group Management workspace screen.

The Group Management dashboard consists of four iViews:

1. The upper left iView shows Groups that have reviews scheduled that have not been closed.
2. The iView on the top right shows the number of open update requests by Group.
3. The iView in the middle shows group change requests that are pending execution.
4. The iView on the bottom shows the list of Groups in your system.



When you click on a Group Management Record you are able to view key information about that Group.

## Archer Experts / Archer Scripts Group Management Tool & Utility

**Asset Catalog Administrator** Group Management

First Published: 9/12/18 10:00 PM Last Updated: 9/30/18 3:21 PM

SAVE SAVE AND CLOSE EDIT DELETE RELATED RECALCULATE EXPORT PRINT EMAIL ACCESS

### ▼ GROUP INFORMATION

Group Name: Asset Catalog Administrator  
Group Created By: Administrator, System  
GUID: 44690160-29e2-4b31-8c98-68cb5f0d014a  
Member Of:  
Description: The Asset Catalog Administrator group is for users who have full administrative access to the following core applications: Applications, Devices, Storage Devices, Technologies, Business Processes, Corporate Objectives, Products and Services, Information Assets, Facilities, and Contacts.

Group ID: 141  
Group Created Date: 3/2/16  
Group Status: Active  
Members (Groups):

### ▼ USERS

Group Users: Berkowitz, Jeff  
Blood, Paul  
Bowers, Brandon  
Feed, Review  
Gao, Feng

Group Users Status: Berkowitz, Jeff (jberkowitz) [Archer Experts] [active] [Last Login: Sep 30 2018 7:20PM UTC]  
Blood, Paul (pblood) [active] [Last Login: Sep 26 2018 6:26PM UTC]  
Bowers, Brandon (bbowers) [active] [Last Login: Sep 28 2018 5:45PM UTC]  
Feed, Review (reviewfeed) [active] [Last Login: Sep 30 2018 7:21PM UTC]  
Gao, Feng (Vengggao) [active] [Last Login: Sep 12 2018 11:43PM UTC]

### ▼ GROUP OWNERSHIP

Business Unit: Owners: owner, oda

### ▼ REVIEW

Frequency of Review: Monthly  
Last Review Date: 8/14/18  
Next Review Date: 9/13/18

### ▼ GROUP USERS MANAGEMENT

GUM ID	Change Type	Users to Add	Users to Remove	Import Users to Add	Import Users to Remove	Status	Requester
<a href="#">GUM-148</a>	Owner Change					Open	owner, oda
<a href="#">GUM-147</a>	Owner Change		Creator, Exception			Closed	owner, oda
<a href="#">GUM-146</a>	Owner Change	Creator, Exception Feed, Review	Gearity, Rich			Closed	owner, oda

[Add New](#)

Some areas of interest include:

1. A list of all the member groups currently within the Group Name being viewed.
2. A list of all Users with access to the Group.
3. A list of the Owners of the Group.
4. The status for the users in the Group.
5. The frequency and dates for the review of the current Group Name.
6. Under the Group Users Management section, you can see a list of the user addition/removal requests created for this group. Each request is a record (a cross referenced field) in the Group Users Management application (2<sup>nd</sup> level of the application).

### Add / Remove Users To / From A Group

The Group Users Management section is a cross referenced field referencing the 2<sup>nd</sup> level of the Group User Management application where user requests are hosted. The screenshot below shows there are some existing requests. E.g.; GUM-1152, GUM-1151, etc.

## Archer Experts / Archer Scripts Group Management Tool & Utility

▼ GROUP USERS MANAGEMENT								<a href="#">Add New</a>
GUM ID ▼	Change Type	Users to Add	Users to Remove	Import Users to Add	Import Users to Remove	Status	Requester	
<a href="#">GUM-1152</a>	Request From User		Gao, Feng			Open	user, oda	
<a href="#">GUM-1151</a>	Request From User					Open	Administrator, System	
<a href="#">GUM-1150</a>	Request From User					Open	Administrator, System	
<a href="#">GUM-1149</a>	Owner Change		Last1, First1			Open	Owner, ODA	
<a href="#">GUM-1148</a>	Owner Change	Last1, First1				Open	Owner, ODA	
<a href="#">GUM-1147</a>	Owner Change	Gearity, Rich				Open	Owner, ODA	
<a href="#">GUM-1146</a>	Owner Change	Berkowitz, Jeff				Open	Owner, ODA	
<a href="#">GUM-1145</a>	Request From User		Bowers, Brandon			Closed	user, oda	
<a href="#">GUM-1144</a>	Scheduled Review		user, oda			Closed		

To add a new request for adding a new user to the group, or removing a user from the group, click “Add New” and you will see the following screen. The requests will remain available for view as an audit trail.

**GUM-148** Group Management

[SAVE](#) [SAVE AND CLOSE](#) [VIEW](#) [DELETE](#)
First Published: 9/30/18 3:29 PM Last Updated: 9/30/18 3:29 PM
[EXPORT](#) [PRINT](#) [EMAIL](#) [ACCESS](#)

**GENERAL INFORMATION**

GUM ID: GUM-148 Status: Open

Change Type: Owner Change

**▼ GROUP INFORMATION**

Group Name	Group ID	Owners	Group Users	Group Users Status	Description	System ID
<a href="#">Asset Catalog Administrator</a>	141	owner, oda	Berkowitz, Jeff Blood, Paul Bowers, Brandon Feed, Review Gao, Feng	Berkowitz, Jeff (berkowitz) [Archer Experts] [active] [Last Login: Sep 30 2018 7:20PM UTC] Blood, Paul (pblood) [active] [Last Login: Sep 26 2018 6:26PM UTC] Bowers, Brandon (bbowers) [active] [Last Login: Sep 28 2018 5:45PM UTC] Feed, Review (reviewfeed) [active] [Last Login: Sep 30 2018 7:21PM UTC] Gao, Feng (fenggao) [active] [Last Login: Sep 12 2018 11:43PM UTC]	The Asset Catalog Administrator group is for users who have full administrative access to the following core applications: Applications, Devices, Storage Devices, Technologies, Business Processes, Corporate Objectives, Products and Services, Information Assets, Facilities, and Contacts.	747778

**▼ REQUEST**

Users to Add:  ...  
 Import Users to Add:  Add

Users to Remove:  ...  
 Import Users to Remove:  Add

Business Justification:

**▼ WORKFLOW**

Require Group Owner Review?: No

Owner Action: ☐ Notify Admin for Execution [Edit](#)

**▼ EXECUTION LOG**

Execution Log:

**▼ ATTACHMENT**

Name	Size	Type	Upload Date	Downloads	History
No Records Found					

[Add New](#)

### Notes:

- When a User (a non-Owner) clicks “Add New”, the application automatically determines that the change type is “Request From User”, and “Require Workflow?” is set to Yes and it cannot be changed to No. This forces workflow for a non-Owner change request. A User can only see change requests they have created.

- When an Owner clicks “Add New”, the application automatically determines that the change type is “Owner Change”, and “Require Workflow?” is set to No and it cannot be changed to Yes.
- A change type record of “Scheduled Review” is created automatically, and it cannot be created by clicking on “Add New”.

You can select the users to be added to the group in the “Users to Add” field. Or attach a CSV file if you want to bulk upload users to the group. In the CSV file, the Archer User Name has to be in the first column with a column header. The same format in the CSV file applies for removing users. For example:

Column header = username

Column content = odauser (this is the User Name as defined in Manage Users. Note – this name cannot be First Name, Last Name (also known as the Account Name). Include all of the User Names in the first column that you want to bulk process.

First Published: 8/6/2018 5:57 PM Last Updated: 8/6/2018 5:57 PM

**GENERAL INFORMATION**

GUM ID: GUM-1220  
Change Type: Owner Change

Status: ☒ Open ☐ Closed

**▼ GROUP INFORMATION**

Group Name	Group ID	Owners	Group Users	Group Users Status	Description	System ID
AM: Admin	85	Owner, ODA Owner1, ODA	Berkowitz, Jeff Gao, Feng Last1, First1 Owner, ODA User, ODA User1, ODA	Berkowitz, Jeff (jeffberky) [active] [Last Login: May 10 2017 9:54PM UTC] Bowers, Brandon (bbowers) [deleted] [Last Login: Oct 6 2016 1:10AM UTC] Gao, Feng (fenggao) [active] [Last Login: Jul 10 2018 1:05AM UTC] Last1, First1 (first1) [inactive] [Last Login: Never logged on] Owner, ODA (odaowner) [active] [Last Login: Jul 11 2018 4:56PM UTC] User, ODA (odauser) [active] [Last Login: Jul 11 2018 1:38AM UTC] User1, ODA (odauser1) [active] [Last Login: Jan 27 2018 9:02PM UTC]	This group is the default for users with the AM: Admin role	207794

**▼ REQUEST**

Users to Add:  ...  
Import Users to Add:  Add  
Business Justification:

Users to Remove:  ...  
Import Users to Remove:  Add

If this is a “Request From User”, change the submission status from “In Process” to “Submitted” and save the record. This will generate an e-mail to the Owner(s) apprising them of the request.

**▼ WORKFLOW**

Require Review?: Yes  
Requester: user, oda  
Reviewer: Owner, ODA  
owner1, oda

Submission Status:   
Submit Date: 10/4/2017  
Review Status: Awaiting Review  
Review Date:

**▼ ATTACHMENT**

Name	Size	Type	Upload Date
No Records Found			

[Add New](#)

Required

If an Owner has a change request to review from a user, when they open the change request record they will be able to Approve or Reject the request. If they Approve the request, the request will be visible on the “Group Change Requests – Pending Admin Execution” report on the Group Management

dashboard. If they Reject the request, nothing is placed on the “Group Change Requests – Pending Admin Execution” report on the Group Management dashboard. In both cases (Approve or Reject), an e-mail is sent to the requester.

When an Owner is creating a change request, they are presented with a radio button labeled “Owner Action – Notify Admin For Execution”. They must select the radio button before saving the record in order for the request to be visible on the “Group Change Requests – Pending Admin Execution” report on the Group Management dashboard.

Records that exist on the “Group Change Requests – Pending Admin Execution” report on the Group Management dashboard are handled by a Group Management Admin, as they are the only users authorized to execute the script that invokes the Archer APIs to modify Group assignments. (See the next page for screenshots and a description of the script which is invoked by the button labeled “Perform User Addition and Removal”).

The following is the screen that is presented to an Admin to execute the script that invokes the Archer APIs to modify the group assignments.

The screenshot displays the Archer Group Management dashboard interface. At the top, there's a header with 'GUM-148 Group Management' and user information: 'Gao, Feng (fenggaol) [Active] [Last Login: Sep 12 2018 11:43PM UTC]'. Below the header, there are action buttons: 'SAVE', 'SAVE AND CLOSE', 'VIEW', and 'DELETE'. On the right, there are 'EXPORT', 'PRINT', and 'EMAIL' options. The main content area is divided into several sections: 'REQUEST', 'WORKFLOW', 'SCRIPTS', 'EXECUTION LOG', and 'ATTACHMENT'. The 'REQUEST' section contains fields for 'Users to Add' (with a dropdown menu showing 'Creator, Exception'), 'Import Users to Add' (with an 'Add' button), 'Users to Remove' (with a dropdown menu), and 'Import Users to Remove' (with an 'Add' button). There is also a 'Business Justification' text area. The 'WORKFLOW' section shows 'Require Group Owner Review?: No' and 'Owner Action: ☒ Notify Admin for Execution'. The 'SCRIPTS' section features a blue button labeled 'Perform User Addition and Removal'. The 'EXECUTION LOG' section has an 'Execution Log' label. The 'ATTACHMENT' section shows a table with columns 'Name', 'Size', 'Type', and 'Upload Date', and a message 'No Records Found'. A red asterisk indicates a required field.

When the “Perform User Addition and Removal” button is clicked by the Admin, the following screen will appear and show the progress. Once the changes are applied (the progress indicator reaches 100%), change the record status from “Pending Admin Execution” to “Closed” and save the record. Saving the record ensures an accurate audit trail.



## Archer Experts / Archer Scripts Group Management Tool & Utility

**GUM-148** Group Management

SAVE SAVE AND CLOSE VIEW DELETE

Gao, Feng (fenggao) [Active] [Last Login: Sep 12 2018 11:43PM UTC]

EXPORT PRINT EMAIL

▼ REQUEST

Users to Add: Creator, Exception ...  
Import Users to Add: Add  
Users to Remove: ...  
Import Users to Remove: Add  
Business Justification:

▼ WORKFLOW

Require Group Owner Review?: No  
Owner Action: ☒ Notify Admin for Execution

▼ SCRIPTS

To Avoid Data Loss, Please Click Here To Save The Record, Or Click The Save Button

Below is a list of actions being performed: 100% Complete

Users To Add To Group Name: Asset Catalog Administrator (Group ID: 141)

Adding user Creator, Exception (with user ID 224) to Group Name: Asset Catalog Administrator ✓

For change types of “Owner Change” and “Scheduled Review”, the process to add and remove users is similar, with the exception that approval by the Group Owner is not required, since only Owners can process “Owner Change” and “Scheduled Review” records. Note that an Admin must still be involved as the final step in the workflow, as only Admins have authorization to execute the script that invokes the Archer APIs to modify the group assignments.

Admins can Create, Read, Update, and Delete any record. If an Admin creates a change request, the record created is of type “Request From User”, since by default an Admin is not considered a group owner. Admins however can act in the role of Requester and Reviewer.

### Notes:

The real-time status updates have been enhanced to display errors that might occur during processing. For example, if a .csv file contains usernames that do not exist, those errors will be displayed and they will also be written to the persistent execution log that is displayed on the layout. See the following for an example:

▼ SCRIPTS

Perform User Addition and Removal

The following User Names from uploaded files for adding are not recognized: odauserT1

The following User Names from uploaded files for removing are not recognized: odauserT1

Below is a list of actions being performed: 100% Complete

Users To Add To Group Name: AM: Business Contacts (Group ID: 90)

Adding user Berkowitz, Jeff (with user ID 209) to Group Name: AM: Business Contacts [User Already In Group] ✓

Adding user odauser (with user ID 244) to Group Name: AM: Business Contacts ✓

## Schedule Group Access Reviews

The Group Management tool & utility automatically schedules Group Access Reviews using the last review date, which is manually entered by the user. The next review date is calculated based on the value of the last review date on the record, and on the Next Review Date, Archer will automatically create a request record and send Group Owners an email.

## Deleted Groups

If a group is deleted through the Archer “Manage Groups” panel, the status of the group will be changed from “Active” to “Deleted – Kept For Audit Trail” when Data Feed GM1 executes.

Once placed in a status of “Deleted – Kept For Audit Trail”, the group and all of its level 2 Group User Management records will be placed in read-only mode for group owners, regardless of whether any level 2 Group User Management record is in an open status. Group Management Administrators may still edit and delete records that have been marked “Deleted – Kept For Audit Trail”.

Note that groups placed in “Deleted – Kept For Audit Trail” status will no longer appear on open status reports nor on scheduled review reports, and scheduled review notifications will no longer be sent for these deleted groups.

Group Management Records		
Group Name ▲	Owners	Group Status
<input type="checkbox"/> <a href="#">A Test Group</a>	owner, oda	Deleted - Kept For Audit Trail
<input type="checkbox"/> <a href="#">AM: Admin</a>	owner, oda owner1, oda	Active
<input type="checkbox"/> <a href="#">AM: Business Contacts</a>	owner, oda	Active