# Archer Control Procedures Content Import

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## Importing Control Procedures through data import

1. From the Archer navigation bar, click on .
2. Select Integration.
3. Select Data Imports.
4. Select Control Procedures.
5. In the upper right-hand corner select Browse and navigate to the Control Procedures CSV file you want to import.
6. Select Add New and select the appropriate Control Procedures file.
7. Click OK.
8. Scroll down and click File Contains HTML Formatting.
9. Click Next.
10. Ensure all fields are mapped as expected in the Import Field Mapping section.
11. During Step 2 – Identification, select Update Existing Records in the Import Type drop down list.
    * Archer will replace any existing control procedures with the updated information
    * Archer will create new records for the new content that is imported. The option **Update Existing Records** does the job of both creating and updating.
12. Click the ellipses on the right-hand side of the Lookup Field(s) field to select the key field for existing Control Procedure records.

**Note:** This field will always be Procedure ID.

1. Scroll down to **Procedure ID** and select that field. That field will appear on the right after a double click.
2. Select **OK**.
3. Ensure that the **Application Fields** are mapped to the headers as expected in the **Import Field Mapping** section.
4. As you scroll right, you will see that most Application Fields are mapped during the import process to match the headers.

* **Note:** SOX Control will not be imported because this field is for the person developing the document.
* **Important:** Authoritative Sources (Sub Section ID) should be mapped to connect to the corresponding Authoritative Source document.

1. To map this field, click the dropdown and scroll down to Authoritative Sources (Sub Section – Sub Section ID).
2. Once selected, click Next.
3. On Step 3 – Wizard Summary, you can confirm that all fields are mapped correctly in the Column Mappings section.
4. Click Import.

## Checking the Control Procedures import

1. Navigate to the Regulatory and Corporate Compliance Workspace.
2. Click the dropdown and select Controls Assurance Program Management.
3. Select the dropdown and select Control Procedures
4. Under the Refine By section, select Control Set and then select the set that you just uploaded into Archer.
5. After selecting your Control Set, then click Apply.
6. Click on the blue Procedure ID links to drill down into a record.
7. Review the record and compare to your source files to ensure everything uploaded correctly.