# Authoritative Sources Data Import Guide

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## Release history

Last updated: June 2023

## 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 Admin menu.
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.

1. Select Browse
2. Then select the appropriate file (which has \_01\_AuthSrc\_SourceLevel)
3. Select the File Contains HTML Formatting in the HTML Formatting section
4. Click Next in the bottom right corner
5. Make sure that all import file names and fields match. If they do not, please refer to the [troubleshooting section](#bookmark3) below.
6. Once you click next, make sure that all file names and fields match.
7. 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](#bookmark3) at the end of the document.
8. Next, repeat this process with the Topic Level csv file.
9. Browse and select the file that ends with \_02\_AuthSrc\_TopicLevel.
10. Select the File Contains HTML Formatting in the HTML Formatting section.
11. Click Next in the bottom right corner
12. Make sure that all import file names and fields match

**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.

1. Click Next in the bottom right corner
2. 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](#bookmark3) at the end of the document. Then repeat this process with the Section Level csv document.
3. Next, repeat this process with the Section Level csv file.
4. Browse and select the file that ends with \_03\_AuthSrc\_SectionLevel
5. Select the File Contains HTML Formatting in the HTML Formatting section
6. Click Next in the bottom right corner
7. Make sure that all import file names and fields match

**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.

1. 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
2. Click Next in the bottom right corner.
3. 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](#bookmark3) at the end of the document.
4. Next, repeat this process with the Sub Section Level csv docume
5. Browse and select the file that ends with \_04\_AuthSrc\_SubSectionLevel
6. Select the File Contains HTML Formatting in the HTML Formatting section
7. Click Next in the bottom right corne
8. Make sure that all import file names and fields match

**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.

1. 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)
2. Click Next in the bottom right corner
3. 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](#bookmark3) at the end of the document.
4. After all four sections of the authoritative source have been imported successfully, move on to the [Confirming Your Content Imported Correctly](#bookmark2) section of this document to confirm everything imported as expected.

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

**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.

## 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.
4. 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.
5. Next, you can confirm that your controls mapped as expected. To enter the record, click the Source name in blue.
6. 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.
7. 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.

## 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.

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](#bookmark1) [Authoritative Sources](#bookmark1) section of this document.

#### Error: Number of section reference is greater than maximum number

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

#### Error: Field required

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

#### Error: Field exceeds the character limit

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

#### Error: Field is a required field

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