# as Installing the Audit Engagements & Workpapers Package

Complete the tasks to install the packages.

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## Package installation sequence

You must complete the tasks for each package in the following order:

1. Install the Enterprise Catalog package.
2. Install the Audit Engagement & Workpapers use case package.
3. Re-install the Enterprise Catalog package to resolve dependencies.

Packages can be downloaded from [Archer community](https://www.archerirm.community/s/archer-use-case-downloads).

## 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. Back 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: Installation approach

The installation process differs between fresh installations and upgrades.

### New Archer customers

New Archer customers using the most current version of Archer Audit Management can skip the package installation process. They can set up their system directly by configuring the data feeds and setting up the data.

### Existing Archer customers (fresh installation)

Existing Archer customers who are new to Archer Audit Management can download the use case package from Archer Community, and proceed to Task 3. When installing the package, select to override the layout and fields.

### Existing Archer customers (Upgrade)

Existing Archer customers upgrading from an older version of Archer Audit Management to the most current version can decide to override the existing configurations or keep the existing configurations and new updates. When upgrading their use case, they can select one of the following options:

* **Create New:** Create new fields, calculations, actions, and more.
* **Create New and Update**: Create new fields, calculations, actions, and more, and updates existing fields and calculations.

Archer provides two different options to manage layouts during package installation:

* **Override:** Moves old fields off the layout which are not included in the new layout.
* **Do not override:** Retains the existing layout; however, new fields are added to the application, but off the layout. Administrators can add the fields

For more information, see Task 5: Install the package.

## Task 3: Import the package

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Available Packages section, click Import.
3. Click Add New, then locate and select the package file that you want to import.
4. Click OK.

* The package file is displayed in the Available Packages section and is ready for installation.

## Task 4: Map objects in the package

### Objects that may not map

For this package, the following table lists the objects that may not map without additional use cases licensed.

| Application | Object | Object Type | Action |
| --- | --- | --- | --- |
| Appointment | Timesheet Task | Field | Do Not Map |
| Audit Engagement | Audit Plan | Field | Do Not Map |
| Audit Engagement | Authoritative Sources | Field | Do Not Map |
| Audit Engagement | Control Procedures | Field | Do Not Map |
| Audit Engagement | Corporate Objectives | Field | Do Not Map |
| Audit Engagement | Expenses | Field | Do Not Map |
| Audit Engagement | Information Assets | Field | Do Not Map |
| Audit Engagement | Internal Audit Customer Survey | Field | Do Not Map |
| Audit Engagement | Internal Audit Quality Assurance Review Checklist | Field | Do Not Map |
| Audit Engagement | Policies | Field | Do Not Map |
| Audit Engagement | Product and Services | Field | Do Not Map |
| Audit Engagement | Risks | Field | Do Not Map |
| Audit Engagement | Third Parties | Field | Do Not Map |
| Audit Entity | Authoritative Sources | Field | Do Not Map |
| Audit Entity | Control Procedures | Field | Do Not Map |
| Audit Entity | Corporate Objectives | Field | Do Not Map |
| Audit Entity | Information Assets | Field | Do Not Map |
| Audit Entity | Policies | Field | Do Not Map |
| Audit Entity | Product and Services | Field | Do Not Map |
| Audit Entity | Risks | Field | Do Not Map |
| Audit Entity | Third Parties | Field | Do Not Map |
| Plan Entity | Audit Plan | Field | Do Not Map |
| Plan Entity | Carried Over From Plan | Field | Do Not Map |
| Audit Program Library | Control Procedures | Field | Do Not Map |
| Audit Workpaper | Control Procedures | Field | Do Not Map |
| Contacts | Activated Plans (Recovery Team) | Field | Do Not Map |
| Contacts | Base Availability | Field | Do Not Map |
| Contacts | BIA (Audit Participant) | Field | Do Not Map |
| Contacts | BIA (Finance Participant) | Field | Do Not Map |
| Contacts | BIA (IT Participant) | Field | Do Not Map |
| Contacts | BIA (Process Owner) | Field | Do Not Map |
| Contacts | BIA (Real Estate Participant) | Field | Do Not Map |
| Contacts | BIA (Regulatory Participant) | Field | Do Not Map |
| Contacts | Business Continuity Plans (BCP Team Members) | Field | Do Not Map |
| Contacts | Business Continuity Plans (External Contacts) | Field | Do Not Map |
| Contacts | Business Continuity Plans (Plan Declaration Authority) | Field | Do Not Map |
| Contacts | Degrees and Certifications | Field | Do Not Map |
| Contacts | Emergency Notifications (Call Initiator) | Field | Do Not Map |
| Contacts | Emergency Notifications (Call Recipient) | Field | Do Not Map |
| Contacts | Expense Reports | Field | Do Not Map |
| Contacts | Loss Events (RCA Analysts) | Field | Do Not Map |
| Contacts | Loss Events (Transactions) | Field | Do Not Map |
| Contacts | Participant | Field | Do Not Map |
| Contacts | Product/Service Contact | Field | Do Not Map |
| Contacts | RCA Analyst | Field | Do Not Map |
| Contacts | Risk Project (Participant) | Field | Do Not Map |
| Contacts | Roles and responsibilities (Primary Lead) | Field | Do Not Map |
| Contacts | Roles and responsibilities (Secondary Contact) | Field | Do Not Map |
| Contacts | Roles and responsibilities (Tertiary Contact) | Field | Do Not Map |
| Contacts | Security Alerts (Related Contact) | Field | Do Not Map |
| Contacts | Storage Devices (Contacts) | Field | Do Not Map |
| Contacts | Team Membership | Field | Do Not Map |
| Contacts | Training Courses | Field | Do Not Map |
| Contacts | Transaction | Field | Do Not Map |
| Contacts | Vendor Profile | Field | Do Not Map |
| Business Processes | Activated Plans (Applications) | Field | Do Not Map |
| Business Processes | Assessment Campaign | Field | Do Not Map |
| Business Processes | Assessment Campaign (Previously Processed Business Processes) | Field | Do Not Map |
| Business Processes | BCM Risk Register | Field | Do Not Map |
| Business Processes | Business Continuity Plans | Field | Do Not Map |
| Business Processes | Business Impact Analysis | Field | Do Not Map |
| Business Processes | Business Process Assessment History | Field | Do Not Map |
| Business Processes | Control Procedures | Field | Do Not Map |
| Business Processes | Crisis Events (Processes) | Field | Do Not Map |
| Business Processes | Engagements (Business Processes) | Field | Do Not Map |
| Business Processes | Link To Risk Library By Business Theme | Field | Do Not Map |
| Business Processes | Link To Risk Library By Risk Event Category | Field | Do Not Map |
| Business Processes | Information Assets | Field | Do Not Map |
| Business Processes | Loss Events | Field | Do Not Map |
| Business Processes | Metrics | Field | Do Not Map |
| Business Processes | Product and Services | Field | Do Not Map |
| Business Processes | Risk Projects | Field | Do Not Map |
| Business Processes | Risks | Field | Do Not Map |
| Business Processes | Risk Statements | Field | Do Not Map |
| Business Processes | Threat Project (Business Process) | Field | Do Not Map |
| Business Processes | Vulnerability Trending (Business Process)(1) | Field | Do Not Map |
| Applications | Activated Plans (Applications) | Field | Do Not Map |
| Applications | Application Assessment | Field | Do Not Map |
| Applications | BCM Risk Register (Applications) | Field | Do Not Map |
| Applications | Business Continuity Plans | Field | Do Not Map |
| Applications | Control Procedures | Field | Do Not Map |
| Applications | Crisis Events (Applications) | Field | Do Not Map |
| Applications | Information Asset | Field | Do Not Map |
| Applications | Product and Services | Field | Do Not Map |
| Applications | Requirements (Applications) | Field | Do Not Map |
| Applications | Risk Project (Applications) | Field | Do Not Map |
| Applications | Threat Project (Applications) | Field | Do Not Map |
| Applications | Vulnerability Scans (Application) | Field | Do Not Map |
| Applications | Vulnerability Trending (Application)(1) | Field | Do Not Map |
| Devices | Activated Plans | Field | Do Not Map |
| Devices | Baseline Control Procedures | Field | Do Not Map |
| Devices | BC/DR Plans | Field | Do Not Map |
| Devices | BCM Risk Register | Field | Do Not Map |
| Devices | Breaches (Asset(s) Involved) | Field | Do Not Map |
| Devices | Configuration Scan Results | Field | Do Not Map |
| Devices | Crisis Events (Devices) | Field | Do Not Map |
| Devices | Device Risk Assessment | Field | Do Not Map |
| Devices | Installed Technologies | Field | Do Not Map |
| Devices | Products and Services | Field | Do Not Map |
| Devices | Requirements (Device Implemented) | Field | Do Not Map |
| Devices | Risk Projects | Field | Do Not Map |
| Devices | Security Alerts (Destination Device) | Field | Do Not Map |
| Devices | Security Alerts (Device Name) | Field | Do Not Map |
| Devices | Security Alerts (Source Device) | Field | Do Not Map |
| Devices | Security Events (Copy of Destination Device - Enterprise Management Context) | Field | Do Not Map |
| Devices | Security Events (Destination Device - Enterprise Management Context) | Field | Do Not Map |
| Devices | Security Events (Source Device - Enterprise Management Context) | Field | Do Not Map |
| Devices | Storage Devices | Field | Do Not Map |
| Devices | Technical Control Manual Assessment | Field | Do Not Map |
| Devices | Threat Projects (Devices) | Field | Do Not Map |
| Devices | Vulnerability Scan Results | Field | Do Not Map |
| Devices | Vulnerability Scans (Devices) | Field | Do Not Map |
| Facilities | Activated Plans (Facilities) | Field | Do Not Map |
| Facilities | BC/DR Plans | Field | Do Not Map |
| Facilities | BCM Risk Register (Facilities) | Field | Do Not Map |
| Facilities | Crisis Events (Facilities) | Field | Do Not Map |
| Facilities | Engagements (Facilities) | Field | Do Not Map |
| Facilities | Facilities Assessment | Field | Do Not Map |
| Facilities | Incidents | Field | Do Not Map |
| Facilities | Information | Field | Do Not Map |
| Facilities | Investigations | Field | Do Not Map |
| Facilities | Requirements (Affected Facilities) | Field | Do Not Map |
| Facilities | Requirements (Facility) | Field | Do Not Map |
| Facilities | Risk Project (Facilities) | Field | Do Not Map |
| Facilities | Security Controls (Site Location) | Field | Do Not Map |
| Facilities | Security Incidents (Affected Facility) | Field | Do Not Map |
| Facilities | Threat Project (Facility) | Field | Do Not Map |
| Facilities | Vendors | Field | Do Not Map |
| Facilities | Vulnerability Scans (Facility) | Field | Do Not Map |
| Facilities | Vulnerability Trending (Facility)(1) | Field | Do Not Map |

### Mapping process

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Available Packages section, locate the package you want to map.
3. In the Actions column, click Map package for that package.

* The analyzer examines the information in the package. The analyzer automatically matches the system IDs of the objects in the package with the objects in the target instance and identifies objects from the package that are successfully mapped to objects in the target instance, objects that are new or exist but are not mapped, and objects that do not exist (the object is in the target but not in the source).
* When the analyzer is complete, the Advanced Package Mapping page lists the objects in the package file and corresponding objects in the target instance.

1. On the Advanced Mapping page, click to open each category and review the icons next to each object to determine which objects you must map manually.

The following table describes the icons.

| Icon | Name | Description |
| --- | --- | --- |
| Awaiting mapping review | Awaiting Mapping Review | Indicates that the system could not automatically match the object or one of its children to a corresponding object in the target instance.  Objects marked with this icon must be mapped manually.  New objects should not be mapped. Select Do Not Map from the drop-down menu to clear this icon for an individual object, or click Do Not Map to clear the icon for all unmapped objects. |
| Mapping completed | Mapping Completed | Indicates that the object and all children are mapped to objects in the target instance, or that they have been marked as Do Not Map. Nothing more needs to be done with these objects in Advanced Package Mapping. |

* **Note:** You can run the mapping process without mapping all objects. The Awaiting mapping review icon is for informational purposes only.

1. For objects awaiting mapping review, do one of the following:
   * To map each object individually, use the drop-down menu in the Target column to select the object in the target instance to which you want to map the source object. To leave an object unmapped, select Do Not Map in the Target column.
   * To automatically map all objects in a category that have different system IDs but the same object name as an object in the target instance, click Auto Map. Select whether to ignore case and spaces when matching object names. Click OK.
   * To mark all unmapped objects as Do Not Map, click Do Not Map.
2. (Optional) Click Filter to enable filter fields that you can use to find specific objects in each mapping category. To undo your mapping selections, click Undo, then select whether to undo all mappings in the category or only the mappings on a single page. If you choose to undo all mappings, you will be returned to the categories list.
3. (Optional) To save your mapping selections and return to the categories list without committing changes to the target instance, click RSA.
4. After you review and map all objects, click Execute.
5. Select I understand the implications of performing this operation. Click OK.

* When the mapping is complete, the Import and Install Packages page displays.
* **Important:** Advanced Package Mapping modifies the system IDs in the target instance. You must update any Data Feeds and Web Service APIs that use these objects with the new system IDs.

## Task 5: Install the package

Archer installs all objects from the source instance into the target instance, unless the object cannot be found or is flagged to not install into the target instance. The Log messages provides a list of conditions that may cause objects not to be installed, and the Package Installation Log section displays a log entry.

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Available Packages section, locate the package file that you want to install, and click the file name or Import at end of the row to open the Options menu.
3. In the Selected Components section, click the Lookup button to open the Package Selector window.
   * To select all components, select the top-level checkbox.
   * To install only specific global reports in an already installed application, select the checkbox associated with each report that you want to install.

* **Note:** Items in the package that do not match an existing item in the target instance are selected by default.

1. Under the Translation Option drop-down menu, select an option for each selected component. To use the same Translation Option for all selected components, select a method from the top-level drop-down list.  
   **Note:** The Translation Option is enabled only when a language is selected.

The following table describes the options.

| Option | Description |
| --- | --- |
| Full Install | Installs the component and its translations from the selected languages. |
| Translations Only | Only installs the translations from the selected languages. |

1. Under the Install Method drop-down menu, select an option for each selected component. To use the same Install Method for all selected components, select a method from the top-level drop-down list.

The following table describes the options.

| Option | Description |
| --- | --- |
| Create New Only | Only creates new fields and other elements in the applications, questionnaires, workspaces, data feeds, and dashboards specified in the package file. This option does not modify any existing elements on your instance of Archer. This is useful when you want to add functionality to an existing application, questionnaire, workspace, dashboard, data feed, or access role, but you do not want to risk making any unwanted changes to the existing elements of workspaces, data feeds, or dashboards. iViews that are not currently on the dashboards that are selected for the package install are created.  **Note:** The Create New Only option does not apply to access roles or languages. |
| Create New and Update | Updates all elements in the applications, questionnaires, workspaces, data feeds, and dashboards as specified in the package file. This includes adding new elements and updating existing elements. Existing iViews on the dashboards that are selected for the package install are updated, and iViews that are not currently on the dashboards that are selected for the package install are created.  **Note:** The Create New and Update option does not apply to access roles or languages. |

1. Under the Install Option drop-down menu, select an option for each selected component. To use the same Install Option for all selected components, select an option from the top-level drop-down list.

The following table describes the options.

| Option | Description |
| --- | --- |
| Do not Override Layout | Installs the component, but does not change the existing layout. This is useful if you have a lot of custom fields and formatting in your layout that you do not want to risk losing.  You may have to modify the layout after installing the package to use the changes made by the package.  **Note:** The Do not Override Layout option does not apply to access roles or languages. |
| Override Layout | Updates the layout as specified in the package file, overwriting the existing layout.  **Note:** The Override Layout option does not apply to access roles or languages. |

1. Click Continue to advance to the next object category in the Package Selector, and repeat steps 4 to 6. After reviewing all object categories, click OK.
2. To deactivate target fields and data-driven events that are not in the package, in the Post-Install Actions section, select the Deactivate target fields and data-driven events that are not in the package checkbox. To rename the deactivated target fields and data-driven events with a user-defined prefix, select Apply a prefix to all deactivated objects, and enter a prefix. This can help you identify any fields or data-driven events that you may want to review for cleanup post-install.
3. Click Install.
4. Click OK.

## Task 6: Review the Package Installation Log

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Package Installation Log section, click the package that you want to view.
3. In the Package Installation Log page, in the Object Details section, click View All Errors.

* **Note:** To view individual logs, in the Errors column of the log you want to view, click the Failures link or Warnings link. Clicking View All Errors, Failures, or Warnings opens the specific errors on a different page.

1. Click the Export icon to export the log file.
2. Click Close.

For a list of packaging installation log messages and remediation information for common messages, see [Package Installation Log Messages](../shared/pkgr_install_msgs.htm).