# Setting Up Audit Engagements & Workpapers Data Feeds

Complete the tasks to set up the Audit Engagements & Workpapers data feeds.

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## Data feed import sequence

Import the data feeds in the following order:

1. Audit\_Entity\_Scope\_Population
2. Audit\_Engagement\_Scope\_Population
3. Audit\_Engagement\_Outscope\_Related\_Controls\_Risks
4. Audit\_Workpapers\_Generation
5. Create\_Audit\_Workpapers\_By\_Audit\_Program
6. Create\_Additional\_Audit\_Workpapers
7. Clear\_Additional\_Library\_Link
8. Data Migration Scoping - Entity Scoping Unit
9. Data Migration Scoping - Risk Scoping Unit
10. Data Migration Scoping - Control Scoping Unit

**Important:**

* If you later license additional use cases that these feeds reference, you must delete and re-import each data feed so that the system can update the mappings.
* In Archer version 2024.03, the closed engagements will have hidden tabs and sections, as checkboxes are not selected. To enable the checkboxes, a schedule, Enable Audit Engagements Options, has been added, which you can run through Application Builder > Schedules, in the Administration menu.

## Task 1: Configure data feeds

Complete the following steps for each data feed.

1. From the menu, click Admin menu > Integration > Data Feeds.
2. If you did not install the data feeds through the package, import them in the above order.
   1. On the data feed listing page, click Download package.
   2. Locate and select the .dfx5 file for the data feed.
3. Select the data feed you want to configure.
4. On the General tab, in the General Information section, select Active.
5. On the Source Connection tab, follow the set of steps below based on the transport type.

### Archer Web Services transport type

1. In the Logon Properties section, do the following:
   1. In the URL field, enter your URL. Your URL depends on whether you're using an on-premises installation and where you installed Archer or whether you're on SaaS:
      * If you're on-premises and installed Archer at the root level of Microsoft Internet Information Services (IIS), your URL should be: *YourServerName*
      * For example, http://grc.mycompany.com
      * If you're on-premises and installed Archer as a sub-site in Microsoft Internet Information Services (IIS), your URL should be: *YourServerName*/*VirtualDirectoryName*
      * For example, http://grc.mycompany.com/Archer
      * If you're using SaaS, your URL should be: *YourSaaSURL*/archerirm.*region*
      * For example, http://mycompany.archerirm.us
   2. Specify whether the Archer instance uses anonymous authentication or Windows Authentication.
   3. In the User Name and Password fields, enter the credentials of a Platform user that has API access and access to all of the records on the Platform instance (from which the data feed originates).
2. In the Transport Configuration section, do the following:
   1. Select a Search Type and do one of the following:
      * Enter the credentials of the account that runs the report. The report results will be based on the permissions of that account.
      * **Note:** The account could be a content administrator with full access permissions to the content of the applications. Do not use the same account that you used to log on.
      * Select Use Windows Authentication. Single Sign-On must be configured in the source instance to use this option.
   2. In the Instance field, enter the name of the instance where the data feed originates (this is the same instance name you enter on the Login window).
3. Click the Data Map tab, then click the Field Map and Key Field Definitions tabs.

* The data feed might map to objects and key fields in applications that you do not have licensed. Clicking on the Field Map and Key Field Definitions tabs allows the system to resolve these mappings.

1. Do one of the following:
   * To continue configuring the data feed, go to the next task.
   * To finish setting up the feed later, click Save or Save and Close.

## Task 2: Schedule data feeds

A data feed must be active and valid to successfully run. A successful data feed run processes all input data, completes all expected record updates, and does not report any failures in the Run Details Report.

### Validating a data feed

The Data Feed Manager validates the information when a data feed is scheduled. If any information is invalid, the data feed displays an error message. You can save the data feed and correct the errors later, but the data feed does not process until you make corrections.

### Running a data feed

You can set up data feeds to run automatically at regular intervals. This reduces the time and effort required to import data from an external file.

You can initiate data feeds at various times and configure them to run in regular increments for an indefinite period of time.

You can run the data feed immediately.

To prevent excess server load, schedule data feeds on a staggered basis. Archer recommends scheduling a maximum of 10 data feeds to run at a time.

### Setting up a reference data feed

A reference feed allows you to specify another feed. This indicates to the Data Feed Service that this feed will start running as soon as the referenced feed completes successfully.

1. Go to the Run Configuration tab > Schedule section.
2. Do one of the following to schedule your data feed.
   * Run on Schedule. You can configure your data feed to run on a defined schedule.
   * Run After. The Data Feed Services starts the current data feed after the referenced data feed completes successfully.
   * Run Now.
3. To save the data feed, click Save or Save and Close.