# Installing Audit Planning & Quality

Complete the following tasks to install the Audit Planning & Quality use case.

On this page

* [Installation Overview](#InstallationOverview)
  + [Task 1: Prepare for the installation](#Task1Preparefortheinstallation)
  + [Task 2: Update the license key](#Task2Updatethelicensekey)
  + [Task 3: Install the package](#Task3Installthepackage)
  + [Task 4: Perform post-installation cleanup](#Task4Performpostinstallationcleanup)
  + [Task 5: Set up data feeds](#Task5Setupdatafeeds)
  + [Task 6: Resolve dependencies between packages](#Task6Resolvedependenciesbetweenpackages)
  + [Task 7: Test the installation](#Task7Testtheinstallation)

## Installation Overview

### Task 1: Prepare for the installation

1. Ensure that your Archer system meets the following requirements:
   * Archer Platform version 2024.03 or later.
   * Valid license for Audit Planning & Quality 2024.03.
   * You have already installed the following use case: Issues Management.
   * A user account on the Platform with access rights to the Data Feed Manager.
   * User account on Archer Community to download the use case files.
2. Download the use case file(s) from Archer.
3. Obtain the *Data Dictionary* for the use case by contacting your Archer Account Representative. The *Data Dictionary* contains the configuration information for the use case.
4. Read and understand "Packaging Data" in the [Archer Platform Help](https://help.archerirm.cloud/archer_suite_help/Default.htm).

### Task 2: Update the license key

You must update the license key if you are installing a new application, questionnaire, workspace, or dashboard.

The administrator (a web or database administrator) on the server on which the Archer Control Panel resides must update the license key in the Archer Control Panel before the application package is imported in order for the new items to be available for use.

1. Open the Archer Control Panel.
2. From the Instance Management list, click to expand the Instances list.
3. Right-click the instance that you want to update, and click Update License Key.
4. Update the applicable information: Serial Number, Contact Info, and Activation Method.
5. Click Activate.

### Task 3: 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 [Installing the Package](audpln_package_install.htm).

### Task 4: Perform post-installation cleanup

The package installation does not update some attributes of objects, or delete obsolete objects that are not included in the current use case. Compare the objects in your database with the information in the *Data Dictionary* to determine which objects are obsolete or have been updated. For more information, see [Performing Use Case Cleanup Post-Installation](../shared/usecase_postinstall_cleanup.htm).

### Task 5: Set up data feeds

You must import and schedule each use case data feed that you want to use. See [Setting Up Data Feeds](audpln_df_setting_up.htm).

### Task 6: Resolve dependencies between packages

After completing the initial installation, you must re-install the use case package and any applicable prerequisite use case packages to resolve any dependencies between them.

1. Install the Issues Management package file.
2. [Install the Audit Planning & Quality package file](audpln_package_install.htm).

### Task 7: Test the installation

Test Audit Planning & Quality according to your company standards and procedures, to ensure that the use case works with your existing processes.