

RSA® ARCHER®
GRC Platform
Implementation Guide

Perceptive Control Solutions
Audit Prodigy 1.0

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Solution Summary

Audit Prodigy Scheduling goes well beyond just assigning projects to resources – it helps you keep your commitments while improving team satisfaction and productivity, all in a powerfully simple way.

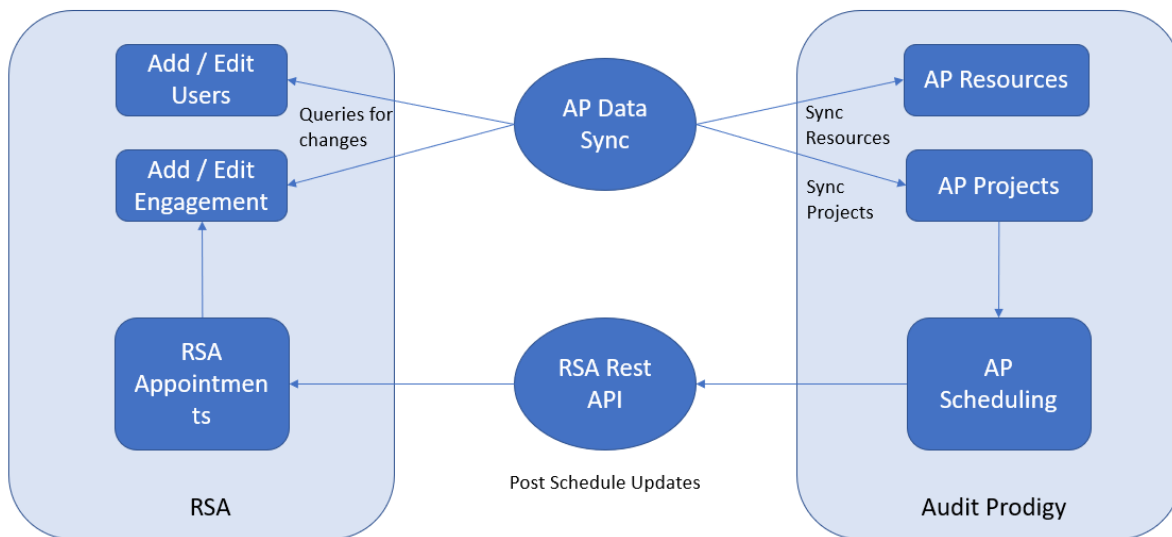
Plan your projects, search competencies to identify and schedule resources and manage results in multiple views, including Gantt Charts. Avoid accidental resource over-scheduling with defined maximum hours, communicate schedule changes with one click, alert leadership about project delays, and eliminate surprises with closed-loop communication workflows. In short, deliver consistent and predictable results with real-time visibility and great team collaboration!

The two-way integration of Audit Prodigy Scheduling Suite with RSA Archer Audit Management solution eliminates duplicate data entry while offering the best of both worlds: relying on Archer as a system-of-record while leveraging Audit Prodigy's best-in-class scheduling and delivery capabilities.

Changes to audit engagements in RSA Archer are automatically synchronized, in near real-time, with Audit Prodigy. At the same time, any scheduling activities performed in Audit Prodigy against engagements are posted to RSA Archer and displayed in the Staffing tab of respective engagements.



Partner Integration Overview	
RSA Archer Solution	Audit Management
RSA Archer Use Case	Audit Engagements & Workpapers
RSA Archer Applications	Audit Engagement, Appointment, Contacts
Uses Custom Application	No
Requires On-Demand License	No



Partner Product Configuration

Before You Begin

This section provides instructions for configuring Audit Prodigy with the RSA Archer GRC Platform. This document is not intended to suggest optimum installations or configurations.

It is assumed that the reader has both working knowledge of all products involved, and the ability to perform the tasks outlined in this section. Administrators should have access to the product documentation for all products in order to install the required components.

All Audit Prodigy components must be installed and working prior to the integration. Perform the necessary tests to confirm that this is true before proceeding.

! > Important: The integration described in this guide is being provided as a reference implementation for evaluation and testing purposes. It may or may not meet the needs and use cases for your organization. If additional customizations or enhancements are needed, it is recommended that customers contact RSA Professional Services for assistance.

Audit Prodigy Configuration

Enabling the RSA Archer Integration in Audit Prodigy

1. To enable the Audit Prodigy and RSA Archer integration, an approved request needs to be submitted to Audit Prodigy Support team to enable the integration.

Sync tool enablement:

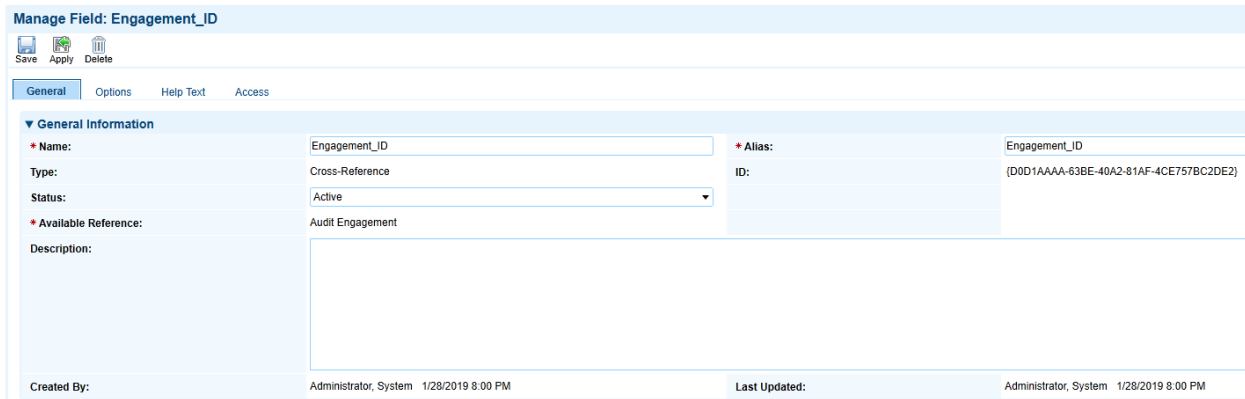
1. Make sure to have an account setup in RSA Archer that has system administrator access to read and modify data through RSA Archer's API & Web Service.
2. The identified account needs to be provided to Audit Prodigy to configure and kick start the sync tool that keeps RSA Archer and Audit Prodigy instance in sync.

RSA Archer GRC Configuration

RSA Archer GRC Configuration

Appointment Application Changes:

1. Two cross reference fields for storing Engagement_Id and Resource_Id needs to be configured
2. Engagement ID field needs to be configured to reference Audit Engagement application as shown in below screen shots.



Manage Field: Engagement_ID

Save Apply Delete

General Options Help Text Access

General Information

* Name: Engagement_ID * Alias: Engagement_ID

Type: Cross-Reference ID: (D0D1AAAA-63BE-40A2-81AF-4CE757BC2DE2)

Status: Active

* Available Reference: Audit Engagement

Description:

Created By: Administrator, System 1/28/2019 8:00 PM Last Updated: Administrator, System 1/28/2019 8:00 PM

Manage Field: Engagement_ID

Save Apply Delete

General Options Help Text Access

Display Control

Control: Grid This option displays a grid containing multiple fields of data from the referenced record spanning the width of the page.
 Single Column This option displays the key of the referenced record in a single column format. Users can make one or more selections according to field configuration.

Options

Required Field: Require users to supply a value for this field before saving the record.
 Auditing Information: Display auditing (last modification) data next to this field. Include user name, date and time of last edit.
 Search Results: Display this field in advanced search and search results.
 Search Default Field: Include this field by default in search results displayed to users.
 Enable Bulk Update: Allow users to initiate bulk update from search results.
 Enable Bulk Create: Allow users to initiate bulk create from search results.
 Enable Inline Edit: Allow this field to be editable in search results.
 Lookup: Allow users to select existing records from the related application through a Lookup control.
 Add New: Allow users to add records in the referenced application from view mode.
 Calculated Field: Set the value of this field using a value calculated from a formula.
 Validate Always: The field will be validated if at least one field changes, otherwise the field will only be validated if its value changes.
 Disable Remove: The remove button will be disabled for records displayed in this field.

Record Lookup Configuration

Display Fields: Engagement Name Engagement ID

3. Resource ID field needs to be configured to reference Contacts application

Manage Field: Resource_ID

Save Apply Delete

General Options Help Text Access

General Information

* Name: Resource_ID * Alias: Resource_ID
 Type: Cross-Reference ID: (641AE339-B941-453F-99A1-F14046CF737C)
 Status: Active
 * Available Reference: Contacts
 Description:

Created By: Administrator, System 1/28/2019 8:02 PM Last Updated: Administrator, System 1/28/2019 8:02 PM

Manage Field: Resource_ID

Save Apply Delete

General Options Help Text Access

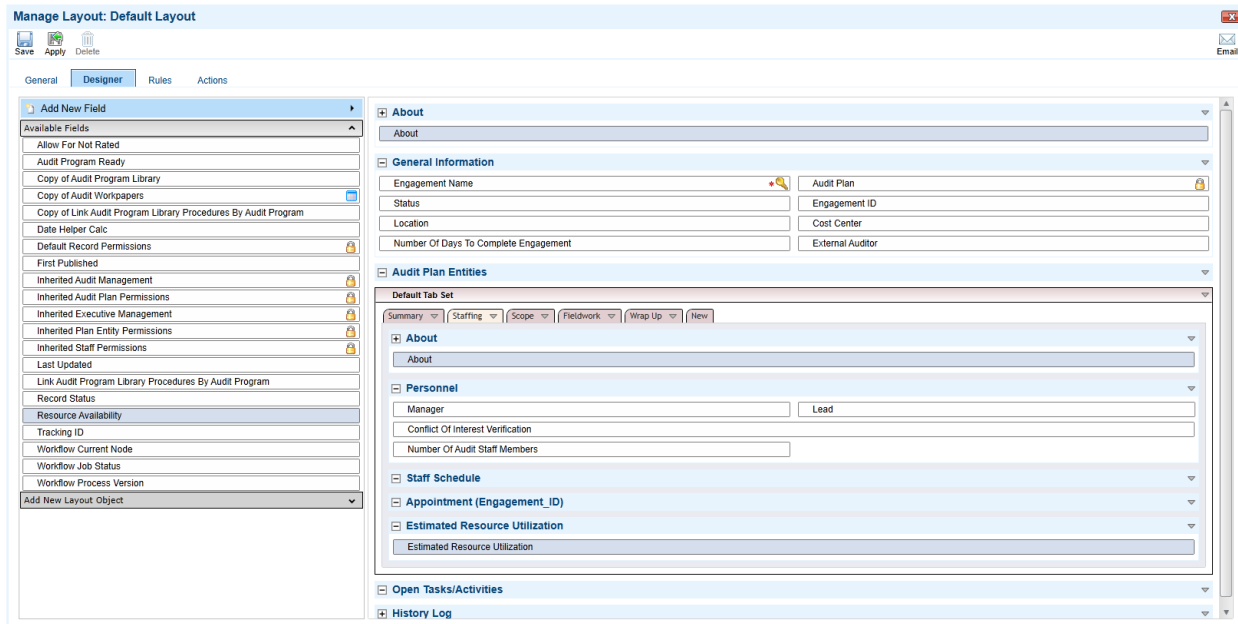
General Information

* Name: Resource_ID * Alias: Resource_ID
 Type: Cross-Reference ID: (641AE339-B941-453F-99A1-F14046CF737C)
 Status: Active
 * Available Reference: Contacts
 Description:

Created By: Administrator, System 1/28/2019 8:02 PM Last Updated: Administrator, System 1/28/2019 8:02 PM

Audit Engagement Application Changes:

1. Need to add a section "Appointment (Engagement_ID)" to list appointment by Engagement in Audit Engagement Staffing screen as below.



2. Below is the example of how appointments are displayed once configurations are in place.

2013 - EMEA Billing & Accounting - Updated Audit Engagement

NEW COPY SAVE SAVE AND CLOSE EDIT DELETE Record 2 of 36 RELATED RECALCULATE EXPORT PRINT EMAIL ACCESS

▼ APPOINTMENT (ENGAGEMENT_ID)						
Tracking ID	Contact Full Name ▲	Appointment Start Date	Appointment End Date	Duration (Hours)	Name	
APPT-362354	Ben Archer	1/28/2019	2/2/2019	20.00	Dan	
APPT-362684	Ben Archer	2/4/2019	2/8/2019	32.00	Sample	
APPT-362474	Charlie Brown	1/28/2019	2/2/2019	20.00		

▼ ESTIMATED RESOURCE UTILIZATION

Certification Environment for RSA Archer GRC

Date Tested: February 12, 2019

Certification Environment		
Product Name	Version Information	Operating System
RSA Archer GRC	6.5	Virtual Appliance
Audit Prodigy	1.0	