

# **RSA Archer® IoT Project Readiness**

**6.7 & Later**

# **RSA®**

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Go to the RSA corporate web site for regional Customer Support telephone and fax numbers:  
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# Chapter 1: Overview of RSA Archer IoT Project Readiness

## About RSA Archer IoT Project Readiness

Companies see value in IoT technology and data collection to improve process and analyze trends to optimize processes; however, 35 percent of customers cite security concerns as a top barrier to IoT implementation. IoT products are extremely broad - examples include flow sensors, traffic sensors, fitness trackers, connected light bulbs, and more. IoT technology is being integrated in all sectors of business, which leads to new network vulnerabilities and security challenges. It is important to keep track of the risks imparted by these technologies.

- IoT projects increase risk and vulnerability due to increased network entry points
- IoT devices must be compliant with corporate policies
- Organizations should manage data privacy and IT Security risks
- IoT projects must be vetted to ensure overall system integration capability

The RSA Archer IoT Project Readiness offering allows customers to document IoT Projects within the organization, allowing customers to prioritize the IoT projects around their business goals and needs. This offering captures the project risks and approvals for implementation. It also helps organizations ensure compliance with corporate policies and regulatory requirements.

## Key Features and Benefits

The RSA Archer IoT Project Readiness offering enables organizations to:

- Document and track IoT projects and IoT solutions infrastructure
- Identify IoT project concerns
- Track mitigation strategies regarding concerns with IoT projects
- Document approvals for IoT project implementation
- Monitor IoT project status

Benefits include:

- Consistent and repeatable process for managing projects and approvals
- Faster cycle times by addressing project risks prior to implementation
- Understanding and minimizing impacts to the organization through mitigating project risks

## Key Terminology

**Application.** Database that stores a specific type of data record such as policies, assessments, assets, threats, vulnerabilities, and controls.

**Authorized User.** A user who has logged into the system and has a right to perform some operation. The system knows the identity and permissions granted to this individual.

**Cross-Reference.** A field type that allows users to create associations between records in the same application (internal references) or records in two separate applications (external references). By adding a cross-reference to an application, the system automatically adds a Related Record field.

**Dashboard.** With reports defined and saved in the inventory of system reports, those identified as Global Reports can be added to dashboards. Each dashboard can include one of many reports in the format they were saved.

**Notifications.** Emails sent from RSA Archer to Users or Groups, based on a schedule or a change in the record status.

**Record.** A collection of field values, stored within applications, sub-forms, or questionnaires.

**Report.** Saved search criteria that can be run again later. In RSA Archer, the construct for reports is a combination of a query and its related output presentation options. The data returned is filtered by a user permission, allowing users to see only the data for which they have been granted access.

**Sub-Form.** For one application, administrators can develop multiple sub-forms to hold all related data. Sub-forms can be shared across applications; however, changing a sub-form affects all applications using that sub-form.

**Task.** Action items that have been assigned to a user in relation to the Support Request.

**User.** Any person who uses and is registered within the system. In this guide, the user is assumed to be an employee using RSA Archer Support Requests.

**User Profile.** Preferences of the registered user that are saved within the system.

**Workspace.** Display mechanism that provides the user with a way to access their data.

## Prerequisites (ODA and system requirements)

Components	Recommended Software
<b>Operating System</b>	Windows Server 2012 R2 or 2016 Standard or Datacenter editions
<b>Database Server</b>	Microsoft SQL Server 2016 SP 1 (64-bit) or 2016 Enterprise Edition (64-bit) or 2017 (64-bit)  <b>Note:</b> SQL Express is not supported
<b>Services Server</b>	Java Runtime Environment (JRE) 8 (64-bit)
<b>RSA Archer</b>	RSA Archer 6.7 and later
<b>On-Demand Licenses</b>	The RSA Archer IoT Project Readiness App-Pack requires one (1) On-Demand Application license.
<b>Prerequisite Applications</b>	Requirements for the installation and operation of RSA Archer IoT Project Readiness includes the following applications: <ul style="list-style-type: none"> <li>• <u>Exception Requests</u> – RSA Archer Issues Management</li> <li>• <u>Remediation Plans</u> – RSA Archer Issues Management</li> </ul>

## Compatible Use Cases and Applications

Application	Use Case	Primary Purpose(s) of the Relationship
<b>Business Unit</b>	RSA Archer Issues Management, RSA Archer Business Impact Analysis, RSA Archer Third Party Catalog, RSA Archer IT Asset Catalog, RSA Archer Policy Program Management, RSA Archer Cyber Incident & Breach Response, RSA Archer Key Indicator Management, RSA Archer Business Asset Catalog, RSA Archer Federal Assessments & Authorizations, RSA Archer Federal Continuous Monitoring	To relate Business Units in scope to the IoT Project
<b>Business Processes</b>	RSA Archer Audit Engagements & Workpapers, RSA Archer Business Impact Analysis, RSA Archer Third Party Engagement, RSA Archer IT Risk Management, RSA Archer Controls Assurance Program Management, RSA Archer Data Governance, RSA Archer Top-Down Assessment, RSA Archer Policy Program Management, RSA Archer IT Controls Assurance, RSA Archer Business Asset Catalog, RSA Archer Bottom-Up Risk Assessment, RSA	To relate Business Processes in scope to the IoT Project

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	Archer Federal Assessments & Authorizations, RSA Archer Federal Continuous Monitoring).	
<b>Applications</b>	RSA Archer Audit Engagements and Workpapers, RSA Archer Business Continuity and IT Disaster Recovery Planning, RSA Archer Third Party Governance, RSA Archer IT Asset Catalog, RSA Archer IT Controls Assurance, RSA Archer IT Security Vulnerabilities Program, RSA Archer IT Risk Management, RSA Archer Cyber Incident & Breach Response, RSA Archer Data Governance, RSA Archer PCI Management, RSA Archer Information Security Management System, RSA Archer Operational Risk Management, RSA Archer Federal Continuous Monitoring	To relate Applications in scope to the IoT Project
<b>Devices</b>	RSA Archer Audit Engagements and Workpapers, RSA Archer Business Continuity and IT Disaster Recovery Planning, RSA Archer Third Party Governance, RSA Archer IT Asset Catalog, RSA Archer IT Controls Assurance, RSA Archer IT Security Vulnerabilities Program, RSA Archer IT Risk Management, RSA Archer Cyber Incident & Breach Response, RSA Archer PCI Management, RSA Archer Information Security Management System, RSA Archer Data Governance, RSA Archer Federal Continuous Monitoring	To relate Devices in scope to the IoT Project
<b>Products and Services</b>	RSA Archer Business Continuity and IT Disaster Recovery Planning, RSA Archer Third Party Risk Management, RSA Archer Third Party Engagement, RSA Archer Cyber Incident and Breach Response, RSA Archer Controls Monitoring Program Management, RSA Archer Business Asset Catalog, RSA Archer Controls Monitoring Program Management, RSA Archer Bottom-Up Risk Assessment	To relate Products and Services in scope to the IoT Project
<b>Facilities</b>	RSA Archer Audit Engagements & Workpapers, RSA Archer Incident Management, RSA Archer Business Continuity and IT Disaster Recovery Planning, RSA Archer Third Party Catalog, RSA Archer IT Controls Assurance, RSA Archer Information Security Management System, RSA Archer PCI Management, RSA Archer IT Risk Management, RSA Archer Cyber Incident & Breach Response, RSA Archer Controls	To relate Facilities in scope to the IoT Project

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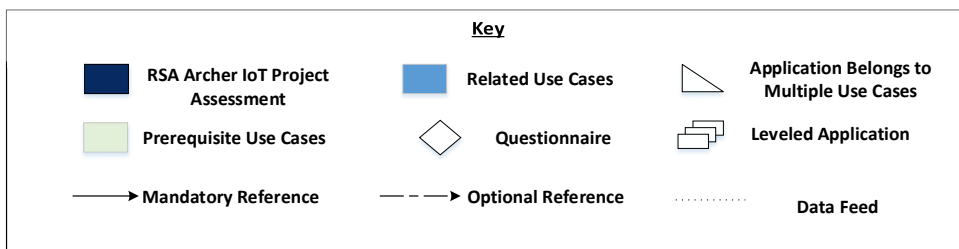
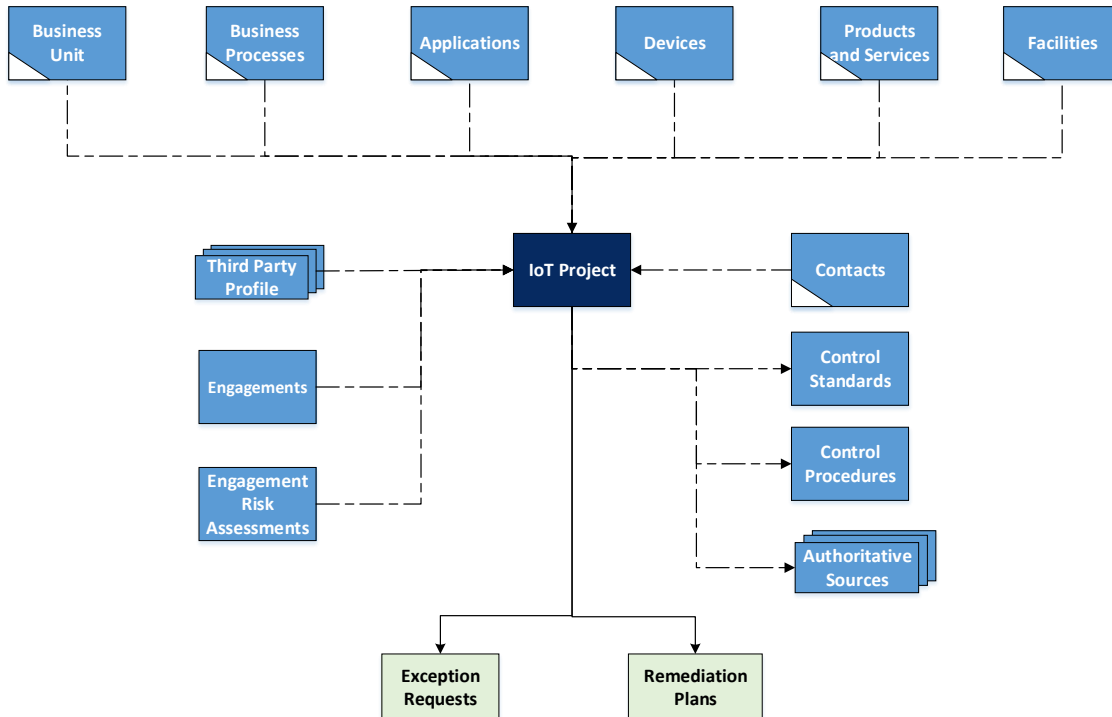
	Monitoring Program Management, RSA Archer Business Asset Catalog, RSA Archer Bottom-Up Risk Assessment, RSA Archer Federal Assessments & Authorization, RSA Archer Federal Continuous Monitoring	
<b>Third Party Profile</b>	RSA Archer Third Party Catalog, RSA Archer Third Party Risk Management, RSA Archer Third Party Engagement	To relate Third Parties to the IoT Project
<b>Engagements</b>	RSA Archer Third Party Catalog, RSA Archer Third Party Risk Management, RSA Archer Third Party Engagement	To relate Engagements to the IoT Project
<b>Engagement Risk Assessments</b>	RSA Archer Third Party Risk Management	To relate Engagement Risk Assessments to the IoT Project
<b>Contacts</b>	RSA Archer Audit Engagements & Workpapers, RSA Archer Incident Management, RSA Archer Business Continuity and IT Disaster Recovery Planning, RSA Archer Third Party Catalog, RSA Archer IT Asset Catalog, RSA Archer Policy Program Management, RSA Archer IT Risk Management, RSA Archer Cyber Incident & Breach Response, RSA Archer Controls Assurance Program Management, RSA Archer Data Governance, RSA Archer Business Asset Catalog, RSA Archer Loss Event Management, RSA Archer Operational Risk Management	To relate employees to the IoT Project
<b>Control Standards</b>	RSA Archer Policy Program Management, RSA Archer Controls Monitoring Program Management, RSA Archer Federal Assessments & Authorization	To relate impacted/in place Control Standards to IoT Project
<b>Control Procedures</b>	RSA Archer IT Controls Assurance, RSA Archer Information Security Management System, RSA Archer PCI Management, RSA Archer IT Risk Management, RSA Archer Controls Assurance Program Management, RSA Archer Data Governance, RSA Archer Top-Down Assessment, RSA Archer Federal Assessments & Authorization	To relate impacted/in place Control Procedures to IoT Project
<b>Authoritative Sources</b>	RSA Archer Policy Program Management, RSA Archer Controls Monitoring Program Management	To relate impacted Authoritative Sources to IoT Project



# Chapter 2: RSA Archer IoT Project Readiness Components

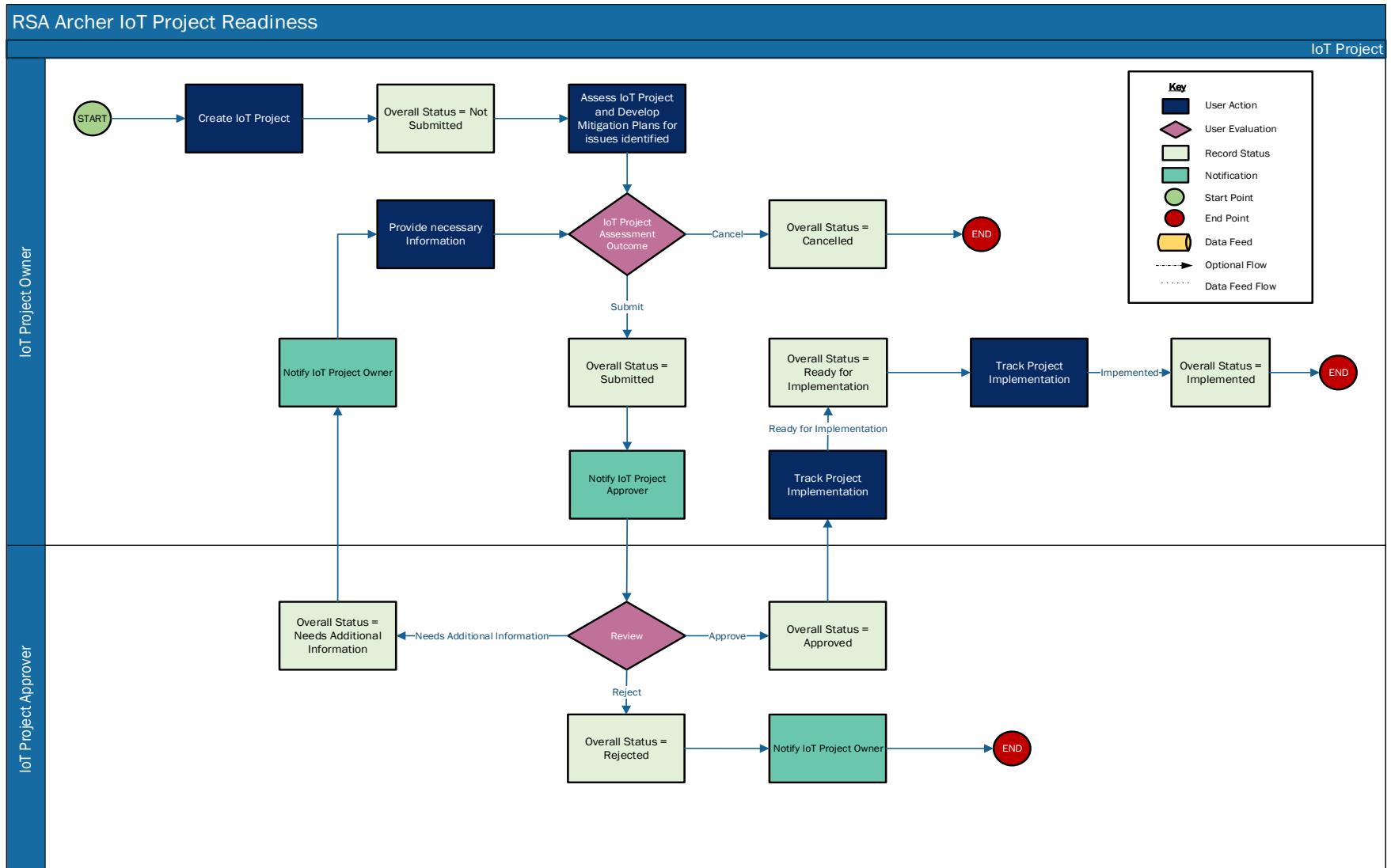
## Architecture Diagram

The following diagram shows the relationship between the applications in RSA Archer IoT Project Readiness.



## Swim Lane Diagram

The following diagram shows the general workflow of the offering.



## Applications

The following table describes the applications in RSA Archer IoT Project Readiness.

Application	Description
<b>IoT Project</b>	The IoT Project application documents information regarding the infrastructure for the IoT project, stakeholders, and project risk assessment. It captures the remediation plans, exception requests, and approvals for implementation.

## Personas and Access Roles

The following table describes the functions that make up the application’s organization roles. Depending on the organization of your company, these functions and responsibilities may vary.

Function	Description	How many (per Information System)?	Optional / Required
<b>IoT Project Owner</b>	Mainly responsible for documenting IoT projects and obtaining approval. They could also be responsible for IoT project evaluation, risk evaluation, and implementation. This person may be someone in the IT department.	Many	Required
<b>IoT Project Approver</b>	Responsible for reviewing and approving IT projects, including IoT projects. Also responsible for overseeing system integration and capabilities for all IT projects. This person may be a manager in the IT department.	Many	Required
<b>Executive</b>	Monitor IT project compliance, exceptions, and risks. This person may be a C-level executive.	One or Two	Optional

Applications	IoT Project: Owner	IoT Project: Approver	IoT Project: Read Only
<b>IoT Project</b>	CRU*	CRU*	R
<b>Remediation Plans</b>	CRU	CRU	R
<b>Exceptions Requests</b>	CRU	CRU	R
<b>Business Units</b>	R	R	R

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<b>Business Processes</b>	R	R	R
<b>Applications</b>	R	R	R
<b>Devices</b>	R	R	R
<b>Products and Services</b>	R	R	R
<b>Facilities</b>	R	R	R
<b>Third Party Profile</b>	R	R	R
<b>Engagements</b>	R	R	R
<b>Engagement Risk Assessments</b>	R	R	R
<b>Contacts</b>	R	R	R
<b>Controls Standards</b>	R	R	R
<b>Control Procedures</b>	R	R	R
<b>Authoritative Sources</b>	R	R	R

*C = Create, R = Read, U = Update, D = Delete, \* Indicates Record Permissions*

**Note:** Members of the groups IoT Project: Owner, IoT Project: Approver and IoT Project: Executives should at least have read access at record level for the applications related to the IoT Project to view or select related records.

## Chapter 3: Installing RSA Archer IoT Project Readiness

Complete the following tasks to install the application.

### Step 1: Prepare for the Installation

1. Ensure that your RSA Archer GRC system meets the following requirements:
  - RSA Archer GRC Platform version 6.7
2. Download the ODA install package from the RSA Archer Exchange on RSA Link: <https://community.rsa.com/community/products/archer-grc/exchange/documentation-downloads>.
3. Read and understand the "Packaging Data" section of the RSA Archer GRC Online Documentation.

### Step 2: 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 RSA Archer IoT Readiness Package” for complete information.

### Step 3: Test the Installation

Test the RSA Archer IoT Project Readiness app-pack according to your company standards and procedures, to ensure that it works with your existing processes.


## Installing the RSA Archer IoT Project Readiness Package

### Step 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. RSA strongly recommends backing 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.

### Step 2: Import the Package


1. Go to the Install Packages page.
  - a. From the menu bar, click  .
  - b. Under Application Builder, click 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.

### Step 3: Map Objects in the Package

1. In the Available Packages section, select the package you want to map.

2. In the Actions column, click  for that package.




The analyzer runs and 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 instances 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).



**Note:** This process can take several minutes or more, especially if the package is large, and may time out after 60 minutes. This time-out setting temporarily overrides any IIS time-out settings set to less than 60 minutes.

When the analyzer is complete, the Advanced Package Mapping page lists the objects in the package file and corresponding objects in the target instance. The objects are divided into tabs, depending on whether they are found within Applications, Solutions, Access Roles, Groups, Sub-forms, or Questionnaires.

3. On each tab of the Advanced Mapping Page, review the icons that are displayed next to each object name to determine which objects require you to map them manually.

The following table describes the icons.

Icon	Name	Description
	Awaiting Mapping Review	Indicates that the system could not automatically match the object or children of the object to a corresponding object in the target instance. Objects marked with this symbol must be mapped manually through the mapping process. <b>Important:</b> New objects should not be mapped. This icon should remain visible. The mapping process can proceed without mapping all the objects. <b>Note:</b> You can execute the mapping process without mapping all the objects. The  icon is for informational purposes only.
	Mapping Completed	Indicates that the object and all child objects are mapped to an object in the target instance. Nothing more needs to be done with these objects in Advanced Package Mapping.

	Do Not Map	Indicates that the object does not exist in the target instance or the object was not mapped through the Do Not Map option. These objects will not be mapped through Advanced Package Mapping and must be remedied manually.
	Undo	Indicates that a mapped object can be unmapped. This icon is displayed in the Actions column of a mapped object or object flagged as Do Not Map.

4. For each object that requires remediation, do one of the following:
  - To map each item individually, on the Target column, select the object in the target instance to which you want to map the source object. If an object is new or if you do not want to map an object, select Do Not Map from the drop-down list.
 

**Important:** Ensure that you map all objects to their lowest level. When objects have child or related objects, a drill-down link is provided on the parent object. Child objects must be mapped before parent objects are mapped. For more details, see " Parent and Child Object Mapping " in the RSA Archer Online Documentation.
  - To automatically map all objects in a tab that have different system IDs but the same object name as an object in the target instance, do the following:
    - a. In the toolbar, click Auto Map.
    - b. Select an option for mapping objects by name.


The following table describes the options.



Option	Description
<b>Ignore case</b>	Select this option to match objects with similar names regardless of the case of the characters in the object names.
<b>Ignore spaces</b>	Select this option to match objects with similar names regardless of whether spaces exist in the object names.


- c. Click OK.
 

The Confirmation dialog box opens with the total number of mappings performed. These mappings have not been committed to the database yet and can be modified in the Advanced Package Mapping page.
- d. Click OK.

- To set all objects in the tab to Do Not Map, in the toolbar, click Do Not Map.
 

**Note:** To undo the mapping settings for any individual object, click  in the Actions column.

When all objects are mapped, the  icon is displayed in the tab title. The  icon is displayed next to the object to indicate that the object will not be mapped.



5. Verify that all other objects are mapped correctly.
6. (Optional) To save your mapping settings so that you can resume working later, see "Exporting and Importing Mapping Settings" in the RSA Archer Online Documentation.
7. Once you have reviewed and mapped all objects, click .
8. Select I understand the implications of performing this operation and click OK.

The Advanced Package Mapping process updates the system IDs of the objects in the target instance as defined on the Advanced Package Mapping page. When the mapping is complete, the Import and Install Packages page is displayed.

**Important:** Advanced Package Mapping modifies the system IDs in the target instance. Any Data Feeds and Web Service APIs that use these objects will need to be updated with the new system IDs.

#### Step 4: Install the Package

All objects from the source instance are installed in the target instance unless the object cannot be found or is flagged to not be installed in the target instance. A list of conditions that may cause objects not to be installed is provided in the Log Messages section. A log entry is displayed in the Package Installation Log section.

1. Go to the Install Packages page.
    - a. From the menu bar, click .
    - b. Under Application Builder, click Install Packages.
  2. In the Available Packages section, do the following:
    - a. Locate the package file you want to install.
    - b. In the Actions column, click .
  3. In the Selected Components section, select the components of the package that you want to install.
    - 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.
4. Click Lookup.
  5. For each component section, do the following:

**Note:** To move onto another component section, click Continue or select a component section in the Jump To drop-down menu.

    - a. In the Install Method drop-down menu, select an install method for each selected component.




**Note:** If you have any existing components that you do not want to modify, select Create New Only. You may have to modify those components after installing the package to use the changes made by the package.

- b. In the Install Option drop-down menu, select an install option for each selected component.

**Note:** If you have any custom fields or formatting in a component that you do not want to lose, select Do Not Override Layout. You may have to modify the layout after installing the package to use the changes made by the package.

6. Click OK.
7. 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 the Apply a prefix to all deactivated objects checkbox, 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.
8. Click Install.
9. Click OK.

#### Step 5: Review the Package Installation Log

1. Go to the Package Installation Log tab of the Install Packages page.
  - a. From the menu bar, click  .
  - b. Under Application Builder, click Install Packages.
  - c. Click the Package Installation Log tab.
2. Click the package that you want to view.
3. In the Package Installation Log page, in the Object Details section, click View All Errors.

## Chapter 4: Using RSA Archer IoT Project Readiness

### Task 1: Create a New IoT Project

**Users:** IoT Project Owner

1. Go to the IoT Project record.
  - a. From the menu bar, click IoT Project Readiness.
  - b. Under Applications, click IoT Project.
  - c. Click New.
2. Fill in the following information in General Information section:
  - a. Enter **IoT Project Name**, **Estimated Start Date** and **Estimated End Date** of the project.
  - b. *(Optional)* Select **Priority** for the project.
  - c. *(Optional)* Select **Stakeholders** by clicking  and selecting their user name.
  - d. *(Optional)* Enter description of the project in **Description**.
  - e. *(Optional)* Provide business justification or business value in **Business Context**.
  - f. *(Optional)* Select **Third Party Involved?** as 'Yes' if third party is involved, else select 'No'. Provide third party details in the Third Party Details tab displayed.
  - g. *(Optional)* Select **Will the IoT Project collect PII data?** as 'Yes' if IoT project is collecting PII data else select 'No'.
3. Select **IoT Project Approver** in the Stakeholders and Approvals section by clicking  and selecting their user name.
4. Select IoT project scope in the Scope tab.
5. Once the record is complete, click **Save** in the Record Toolbar to save in record.

### Task 2: Submit IoT Project

**Users:** IoT Project Owner

1. Open the IoT Project you want to submit.
2. Click the **EDIT** button in the top of the record.
3. Provide details of the IoT project in the Infrastructure and Implementation tab.
4. Complete risk assessment for the IoT project, in the Risk Assessment tab.
5. *(Optional)* Click **Add New** in the right corner of the Comments section and add comments.
6. *(Optional)* Attach any additional documentation or files in the **Supporting Documentation** field.
7. Provide assessment results and recommendation in the **Overall Recommendation** field, in the Risk Assessment tab.
8. Click on the **Submit** button at the top left of the screen.

### Task 3: Review IoT Project

**Users:** IoT Project Approver

1. Select the IoT Project you want to review from the Tasks section on your Task landing screen.  
OR

Go to the IoT Project record.

- a. From the menu bar, click IoT Project Readiness.
- b. Under Applications, click IoT Project.

Select the IoT Project record in 'Submitted' Status.

2. Click the **EDIT** button in the top of the record.
3. To Approve the IoT Project
  - Review the record and click **Approve** from the Actions dropdown at the top left of the screen.
4. To request additional information from the IoT Project Owner:
  - Document the additional information requested in the **Comments** field.
  - Click **Needs Additional Information** from the Actions dropdown at the top left of the screen.
5. To Reject the IoT Project:
  - Document the **Reason for Rejection** in the Stakeholders and Approvals section.
  - Click **Reject** from Action dropdown at the top left of the screen.

## Task 4: Resubmit IoT Project

**Users:** IoT Project Owner

1. Select the IoT Project record you want to resubmit from Tasks section on your Task landing screen.

OR

Go to the IoT Project record.

- a. From the menu bar, click IoT Project Readiness.
- b. Under Applications, click IoT Project.

Select the IoT Project record in 'Needs Additional Information' Status.

2. Click the **EDIT** button in the top of the record.
3. Check the comments in the **Comments** section.
4. Modify/Provide the required information in the appropriate section or tab.
5. Attach any additional documentation or files in the **Supporting Documentation** field, if requested.
6. Click **|Add New|** in the right corner of the **Comments** section and add comments, if required.
7. Click **Resubmit** from the Actions dropdown at the top left of the screen.

## Task 5: Track IoT Project Implementation

**Users:** IoT Project Owner

1. Go to the IoT Project record.
  - a. From the menu bar, click IoT Project Readiness.
  - b. Under Applications, click IoT Project.
2. To mark the IoT project as Ready for Implementation do the following:
  - a. Select the IoT Project record in 'Approved' Status.
  - b. Click the **EDIT** button in the top of the record.

- c. Enter **Implementation Plan** in the Implementation Status section of Infrastructure and Implementation tab.
  - d. Enter **Actual Start Date**, **Actual End Date** and **Actual Cost** in the General Information Section. Make any other necessary changes to the record.
  - e. Change **Implementation Status** to Ready for Implementation in the Implementation Status section of the Infrastructure and Implementation tab.
  - f. Click **Save** in the Record Toolbar to save in record.
5. To mark the IoT project as Implemented do the following:
  - a. Select the IoT Project record in 'Ready for Implementation' Status.
  - b. Click the EDIT button in the top of the record.
  - c. Enter **Actual Start Date**, **Actual End Date** and **Actual Cost** in General Information Section, if not provided.
  - d. Change **Implementation Status** to Implemented in the Implementation Status section of Infrastructure and Implementation tab.
  - e. Click **Save** in the Record Toolbar to save in record.

## Task 6: Cancel IoT Project

**Users:** IoT Project Owner

1. Go to the IoT Project record.
  - a. From the menu bar, click IoT Project Readiness.
  - b. Under Applications, click IoT Project.
2. To cancel IoT project in "Not Submitted" stage:
  - a. Select the IoT Project record in 'Not Submitted' Status.
  - b. Click the EDIT button in the top of the record.
  - c. Select **Cancel Request?** = Yes, in the Stakeholders and Approvals section.
  - d. Document the **Reason for Cancellation** in the Stakeholders and Approvals section.
  - e. Click **Save** in the Record Toolbar to save in record.
3. To cancel IoT project in "Needs Additional Information" stage:
  - a. Select the IoT Project record in 'Needs Additional Information' Status.
  - b. Click the EDIT button in the top of the record.
  - c. Document the **Reason for Cancellation** in the Stakeholders and Approvals section.
  - d. Click **Cancel** from the Actions dropdown at the top left of the screen.