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Archer® Suite

Archer Version 2024.09

Implementation Guide

BitSight – Archer Integration

Version 2.3

Revision 2/28/2025

Logo

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# Release Notes

## 

## Release 2.3

Version 2.3 was a minor revision which added the **Tier** field to be synced into Archer.

## Release 2.2

Version 2.2 was a minor revision which added additional error handling when alert-only or companies were empty after an API endpoint change.

## Release 2.1

Version 2.1 was a minor revision which added the **Company ID** field to be synced into Archer.

## Release 2.0

Version 2.0 is a complete rewrite from our first release, provides more functionality, and an improved user experience for retrieving new companies and recurring updates.

### New and Changed Features

* Easily add new companies from within Archer’s Third Party Profile and obtain BitSight ratings for those companies
* Ability to obtain ratings for all companies in your BitSight portfolio into Archer automatically (V1 allowed only one) in one process
* Receive Alerts and Security Incidents/Public Disclosures per company based on your BitSight subscription (Total Risk Monitoring or Risk Monitoring) to monitor the risk your vendors present to your organization
* Ability to leverage the new BitSight Assessment Accelerator (BAA) licensing model for one-time pull of detailed vector ratings to evaluate potential vendors or perform periodic risk assessments
* Ability to switch subscriptions between Total Risk Monitoring and Risk Monitoring licenses from within Archer
* Allow for new companies to be requested if they are in your Third Party Profile list in Archer but not yet in BitSight and will be automatically added to your portfolio when available

## Release 1.0

* BitSight’s first opportunity for customers to integrate with Archer
* The Integration only pulled ratings one company at a time via a data feed
* Displayed headline security ratings as well as detailed vector ratings

# Chapter 1: Overview of BitSight Security Ratings

## About BitSight Security Ratings

BitSight transforms how companies take on [third party risk management](https://www.bitsight.com/third-party-risk-management) and [security performance management](https://www.bitsight.com/security-performance-management). BitSight’s leading [security reporting](https://www.bitsight.com/glossary/security-reporting) service delivers actionable security ratings, [cyber risk quantification](https://www.bitsight.com/glossary/cyber-risk-quantification), [cyber risk metrics](https://www.bitsight.com/glossary/cyber-risk-metrics) and [security benchmarks](https://www.bitsight.com/glossary/security-benchmarks) through [continuous monitoring](https://www.bitsight.com/glossary/continuous-monitoring) of large pools of objective and independently verified data. By enabling more complete [security visibility](https://www.bitsight.com/glossary/security-visibility) and evaluating how well an organization’s attack surface and third parties are protected against [cybersecurity threats](https://www.bitsight.com/glossary/cybersecurity-threats), BitSight helps to improve [cybersecurity posture](https://www.bitsight.com/glossary/cybersecurity-posture) and manage risk more efficiently and effectively.

The BitSight and Archer integration brings infosec data from BitSight to the Archer Platform enabling a mapping between the quantitative, dynamic security rating information generated for a specific company by BitSight with vendor catalog and risk management information that resides in the Archer.

## Key Features and Benefits

Key benefits

With the offering, you will be able to:

* Ability to quickly add BitSight Security Ratings linked to Third Party Profiles
* Nightly updates of risk ratings and detailed vectors
* Ability to switch subscription types
* Custom alerts defined in the BitSight Portal presented in Archer
* Security Incidents/Public Disclosures populated in Archer

## Prerequisites (ODA and system requirements)

|  |  |
| --- | --- |
| Components | Prerequisites |
| Archer Solution Area(s) | Archer Third Party Governance |
| Archer Use Case(s) | Archer Third Party Catalog |
| Archer Applications | Third Party Profile |
| Uses Custom Application | Yes |
| Requires On-Demand License | Yes, 2 On-Demand Licenses are required. |
| Archer Requirements | Archer 2024.09 and later |
| Partner/Vendor Requirements | Valid BitSight subscription or license is required. |
| Operating System | Windows Server 2012 R2 or later |
| Database Server | Microsoft SQL Server 2014 (64-bit) |
| Services Server | Java Runtime Environment (JRE) 8 (64-bit) |
| API Hosting Server | Any Windows Server version  Node.js 20.18.0 or later |

## 

## Compatible Use Cases and Applications

### Related Applications

|  |  |  |
| --- | --- | --- |
| **Application** | **Use Case** | **Primary Purpose(s) of the Relationship** |
| Third Party Profile | Third Party Catalog | * You can tie your Third Party Profile to the BitSight Company profile for detailed insights on the risk the vendor poses to your organization and manage appropriately. * Assists with periodic risk reviews of vendor |

### Impacted Use Case(s)

|  |
| --- |
| Archer Use Case(s) |
| Third Party Catalog |

## Impacted Fields (Integrations only)

A single cross reference between Third Party Profiles and the BitSight Portfolio ODA will link the two records together. All other integration data is mapped to the new BitSight ODAs.

## Additional Resources

The following additional resources are available for this offering:

* [BitSight Website](https://www.bitsight.com/)
* [Tutela Solutions Website](https://www.tutela-solutions.com/)

# Chapter 2: BitSight Security Ratings Components

## Architecture Diagram

Below is the architecture of the BitSight Security Ratings solution.

**Third Party Profile (TPP)** will start the process by adding a new vendor record. The web site domain will be used to pull data from BitSight to create BitSight Portfolio records in Archer.

The **BitSight Portfolio** application stores all the critical security rating information about your vendors to make informed decisions about the risk they pose to your organization. Functionality within this application allows you to manage your subscription/licenses and view related alerts and public disclosures/security breaches. The data can be calculated up into the Third Party Profile for risk practitioners to drive assessments and decisions.

The **BitSight Alerts and Breaches** application stores all the alerts defined in your BitSight Portal for companies with the Total Risk Monitoring (TRM) or Risk Monitoring (RM) subscriptions. Alerts include specific vulnerabilities, rating percent changes, defined rating threshold changes, risk vector grade changes, NIST CSF Grades, and exposed credentials. In addition, any public disclosures/security breaches are also documented in this application.

The **BitSight Dashboard** is configured to allow easy access to common functionality for adding new vendors, performing mapping between TPP and BitSight Portfolio records, obtaining headline ratings, and the detailed vectors. Direct links to the BitSight Portal and BitSight Reports provide quick access to additional functionality. Insightful reports display security incidents/breaches, critical alerts, and rating changes.



## Swim Lane Diagram

The following information describes the swim lane diagram further below. Please reference the diagram for a visual understanding of the process.

The **Initial Setup** process starts with creating a record in Third Party Profile and specifying the web site domain of that company. A scheduled job identifies records with new vendors, retrieves a list of companies that match BitSight’s catalog of companies tracked, and creates those BitSight Portfolio records in Archer. If only 1 record was returned, it will be linked to the Third Party Profile record. If it multiple records were returned (large companies with multiple web sites/domains), a simple mapping process would be completed using an inline edit report or directly from the Third Party Profile to link to the desired BitSight Portfolio record.

The practitioner would then need to **Decide the Level of Monitoring** based on the information they need for this vendor. The two paths are:

1. Using a Total Risk Monitoring or Risk Monitoring subscription
2. High level headline ratings
   1. If further details are needed, you could utilize a BitSight Assessment Accelerator (BAA) to obtain detailed vector information.

If **Subscribe to TRM or RM** was selected, the risk practitioner would click into the BitSight Portfolio company record, click on the BitSight Portal Link, and subscribe to either TRM or RM. The nightly integration applications would retrieve the data appropriate for each license.

|  |  |  |
| --- | --- | --- |
| **Feature** | **Risk Monitoring** | **Total Risk Monitoring** |
| Headline Rating | þ | þ |
| Detailed Vector Ratings | ý | þ |
| Alerts | þ | þ |
| Security Breaches/Public Disclosures | þ | þ |

If **License Headline and Vectors** was chosen, an inline edit report helps quickly select records to receive the headline ratings for selected companies. Periodically the integration applications run to identify those records queued, retrieve the headline data from BitSight, and update the records in Archer.

If additional vector information is desired, the risk practitioner would edit the BitSight Portfolio record and change the setting to perform a one-time pull of the detailed vectors. Periodically the integration applications run to identify those records queued, retrieve the detailed vector data from BitSight, and update the records in Archer.

The following diagram shows the general workflow of the solution:

*Hint: Using the zoom feature, you can zoom in closer to display all the components clearly.*

## Applications

The following applications are used in the BitSight Security Ratings solution.

|  |  |
| --- | --- |
| Application | Description |
| Third Party Profile | Third Party Profile is where you specify the web site domain of the company which triggers the BitSight search and populates records in the BitSight Portfolio ODA described below. Risk ratings are calculated into the Third Party Profile to provide insights into your Third Party Risk program. |
| BitSight Portfolio | The BitSight Portfolio ODA manages the type of subscription/license and appropriate data to make informed risk decisions about your vendors. BitSight Total Risk Monitoring and the BAA One Time Pull of Risk Vectors will show detailed risk vector information. Risk Monitoring and Headline ratings will show aggregate ratings, but not the details. |
| BitSight Alerts and Breaches | For companies subscribed to Total Risk Monitoring and Risk Monitoring, a nightly job will update the BitSight Alerts and Breaches application with any alerts configured in the BitSight Portal and any Security Breaches/Public Disclosures identified. |

## 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 |
| BitSight Admins | BitSight Admins have full create, read, update, and delete access to both BitSight ODAs (Portfolio and Alerts/Breaches) and ability to reset synchronization settings/flags. |
| BitSight Users | BitSight Users are typically Risk Managers evaluating vendors/suppliers. They have access to the BitSight dashboard, edit access to certain fields in the BitSight Portfolio to manage the licensing/subscriptions to obtain appropriate risk information for a company, and can view all Alerts and Breaches associated to each of the companies in the portfolio. |
| BitSight API Users | Provides access to two API user accounts used to create and update the BitSight Portfolio and BitSight Alerts and Breaches applications. Also has update access to update a field in the Third Party Profile application to reset a flag for searching for companies. These accounts follow the least-privilege access model for enhanced security. |

# Chapter 3: Installing BitSight Security Ratings

## Installation Overview

Complete the following tasks to install the offering.

## Step 1: Prepare for the Installation

1. Ensure that your Archer system meets the following requirements:
   * Archer Platform version 2024.09 or later.
2. Obtain the *Data Dictionary* for the ODA by contacting your Archer Account Representative or calling 1-888-539-EGRC. The Data Dictionarycontains the configuration information for the use case.
3. Read and understand the "Packaging Data" section of the Archer 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 Application Package](#InstallAppPackage) for complete information. Manual configuration is also necessary to properly setup the solution.

## Step 3: Set up Integration Applications

The BitSight integration utilizes scheduled integration applications. See [Setting Up Integration Applications](#SettingUpDataFeeds) for complete information.

*Note: Data Feeds may be available in a future version, however they will not be available for SaaS or Hosted customers due to the restrictions Archer IRM has regarding JavaScript Transporter Data Feeds which were not directly developed by Archer IRM and are not digitally signed by Archer IRM.*

## Step 4: Test the Installation

Test the application according to your company standards and procedures, to ensure that the use case works with your existing processes.

## Installing the Package

### 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. Archer 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.

### Task 2: Import the Package

1. Go to the Install Packages page.
   1. From the menu bar, click .
   2. 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.

### Task 3: Map Objects in the Package

**Important:** This step is required only if you are upgrading to a later version of BitSight Security Ratings.

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.

1. 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.

|  |  |  |
| --- | --- | --- |
| 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.  **Important:** New objects should not be mapped. This icon should remain visible. The mapping process can proceed without mapping all the objects.  **Note:** 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. |

1. 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 "Mapping Parent/Child Objects" in the 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:
2. In the toolbar, click Auto Map.
3. Select an option for mapping objects by name.

|  |  |
| --- | --- |
| Option | Description |
| Ignore case | Select this option to match objects with similar names regardless of the case of the characters in the object names. |
| Ignore spaces | Select this option to match objects with similar names regardless of whether spaces exist in the object names. |

1. 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.

1. 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.

1. Verify that all other objects are mapped correctly.
2. (Optional) To save your mapping settings so that you can resume working later, see "Exporting and Importing Mapping Settings" in the
3. Archer Online Documentation.
4. Once you have reviewed and mapped all objects, click .
5. 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.

### Task 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.
   1. From the menu bar, click .
   2. Under Application Builder, click Install Packages.
2. In the Available Packages section, locate the package file that you want to install, and click Install.
3. In the Configuration 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.

1. In the Configuration section, under Install Method, 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.

**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.

1. In the Configuration section, under Install Option, 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.

**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.

1. 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.
2. Click Install.
3. Click OK.

### Task 5: Review the Package Installation Log

1. Go to the Package Installation Log tab of the Install Packages page.
   1. From the menu bar, click .
   2. Under Application Builder, click Install Packages.
   3. 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 Warnings.

# Manual Changes in BitSight Portfolios Application

The only manual change required is to configure the BitSight Tiers field with the Tiers your organization uses as this is not updated automatically.

NOTE: No changes are required if you are using the default BitSight Tier Names: Tier 1, Tier 2, and Tier 3.

**Steps:**

1. Edit the “**BitSight Tier**” field in the **BitSight Portfolio** application.

a. Add or rename the Tier values exactly from your BitSight Portal (Risk Program Setup 🡪 Tier Settings) as values in the **BitSight Tier** values list field.

*Example BitSight Values:*

A screenshot of a computer

AI-generated content may be incorrect.

*Example Archer BitSight Tier Values:*

A screenshot of a computer

AI-generated content may be incorrect.

# Manual Changes in Third Party Profile Application

Most organizations intend to leverage the BitSight integration solution by pairing with the Third Party Profile application in the Third Party Catalog use case. The steps below outline a suggested approach for leveraging that data. Your organization may enhance the Third Party Profile with additional calculations, DDEs, or notifications to leverage the BitSight security ratings. Archer IRM prohibits vendors from packaging core applications such as Third Party Profile to ensure long-term compatibility and therefore manual changes are required.

**Important Note:** It is critical the fields below be created with the exact name and values outlined below to ensure proper functionality. The fields can be placed anywhere on the application, but the naming is critical for the integration applications.

* + 1. Manage the **Third Party Profile** application in Application Builder
    2. Create a new Record Permission field
       1. Name: ARP\_Automatic Record Permission - BitSight
       2. Change Permission Model to **Automatic**
       3. In the Default Users/Groups section, add the following groups:
          1. BitSight API Accounts with Read and Update
          2. BitSight Admins with Read and Update
    3. On the **Risk Ratings** tab (or wherever you prefer), create the following objects:
       1. Create New Section: BitSight Portfolio Matching
          1. Create Layout Object Text Box:

Name: BitSight Portfolio Matching Instructions

Description: **Instructions:** Enter a domain (company.com) to restrict the BitSight Portfolio lookup to link between TPP and BitSight Portfolio records. If this TPP record is new, you will need to enter this information and save the record for processing to search and create BitSight Portfolio records in Archer.

Display when editing a record: checked

Display when viewing a record: checked

* + - * 1. Create Text Field:

Name: Domain

Single Line

Make this a searchable field: checked

Enable editing in search results: checked

* + - 1. Create Section: BitSight Portfolio
         1. Create Layout Object Text Box:

Name: BitSight Rating Information

Description: The **BitSight Rating** information below is pulled from the related BitSight Portfolio record.

Display when editing a record: checked

Display when viewing a record: checked

* + - * 1. BitSight Portfolio cross-reference should already exist from package creation and can be dragged onto layout. If the field is not available, create a new cross-reference field with these settings:

Name: BitSight Portfolio

Display Control: Grid

Make this a searchable field: checked

Enable editing in search results: checked

Allow users to select existing records: checked

Record Lookup Configuration - Fields to display:

BitSight Company Name

Domain

Description

Industry

Current Subscription Type

Related Third Party Profile

Grid Display Properties - Fields to display:

BitSight Company Name

Description

Industry

Current Subscription Type

Rating

Rating Category

Rating Date

Minimum Selection: No Minimum

Maximum Selection: 1

* + - * 1. Values List:

Name: BitSight Rating Category

Make this a searchable field: checked

Global Values List: BitSight Rating Category

Make this a calculated field: checked

Formula:

IF (COUNTA([BitSight Portfolio])=1,REF([BitSight Portfolio],[Rating Category]),NOVALUE())

* + - * 1. Numeric:

Name: BitSight Rating

Make this a searchable field: checked

Make this a calculated field: checked

Formula:

IF (COUNTA([BitSight Portfolio])=1, REF([BitSight Portfolio],[Latest Rating]), NOVALUE() )

* + - 1. Create Section: BitSight Debug Section
         1. Create Values List:

Name: BitSight Portfolio Created?

Field-Specific Values List

Values:

No

Set “No” to default value

Yes

Make this a searchable field: checked

Enable bulk update from search: checked

Enable editing in search results: checked

* + - * 1. Create Values List:

Name: BitSight Subscription

Global Values List: BitSight Current Subscription Type

Make this a searchable field: checked

Make this a calculated field: checked

Formula:

IF

(

COUNTA([BitSight Portfolio])=0,

NOVALUE(),

REF([BitSight Portfolio],[Current Subscription Type])

)

* 1. **Update Values List Graphics**

The Global Values List **BitSight Rating Grades** displays graphics for the vectors. Update the GVL to display the color-coding graphics in the Portfolio.

* + 1. Under **Application Builder**, click **Global Values Lists**
    2. Search or click on the GVL named **BitSight Rating Grades**
    3. Click on each value and upload the appropriate image:

1. Click **Edit** near the **Image** section
2. Click **Add New** on the top-right to upload the image
3. Scroll down or search for “BitSight” and select the appropriate image
4. Click the **OK** button
5. Click the **Save** button
6. Repeat for all values B, C, D, F, and N/A
   * 1. Click **Save and Close** button
   1. **Create new report in Third Party Profile**
      1. Name: BitSight Company Listing
      2. Selected Fields:
         1. Third Party Name
         2. Third Party Status
         3. Domain
         4. BitSight Portfolio
         5. BitSight Rating Category
         6. BitSight Rating
         7. BitSight Subscription
      3. Filters:
         1. None - *Unless you only want to show TPPs without a portfolio for matching purposes*
      4. Sorting:
         1. Third Party Name - Ascending
         2. Optional if used in your organization:
            1. Subsidiary Third Party Name - Ascending
            2. Sub-Subsidiary Third Party - Ascending
      5. Display Format: Column - Flat
      6. Record Count: Return All
      7. Results Per Page: 50
      8. Enable Inline Edit: Checked
      9. Search and Save report
         1. Description: Report for BitSight profile selection using inline edit.
         2. Permissions: Global to Everyone
   2. **Update BitSight Quick Links iView**
      1. Overview: Add the new report created above to the list of links
      2. Edit the properties of the BitSight Quick Links iView
      3. In the Configuration section, click Add New
         1. Name: BitSight TPP Listing
         2. Action: Embed in an existing window
         3. Change the search dropdown from Forum to Reports
         4. Search for BitSight Company Listing
         5. Add BitSight Company Listing to the Selected Links
         6. Choose any Primary Graphic of your choice.
            1. Suggested graphic: 

# Setup Integration Applications

## Task 1: Create Two Archer API User Accounts

*Below are some suggested names and settings. However, please follow any organizational standards and simply take note of the differences when configuring the JavaScript applications.*

*NOTE: It is very important to use two different accounts because the jobs run at different times and may cancel/inactivate a session token and interrupt the longer-running nightly jobs.*

1. First Account Settings:
2. First Name: dfm\_BitSightAPIDaily
3. Last Name: API
4. User Name: dfm\_BitSightAPIDaily
5. Security Parameter: Data Feed and API Parameter (or whatever parameter your company uses with non-expiring passwords)
6. Password: Whatever you want
7. Force Password Change: unchecked
8. Groups: BitSight API Accounts
9. Second Account Settings (*Similar as above, but different account*):
10. First Name: dfm\_BitSightAPINightly
11. Last Name: API
12. User Name: dfm\_BitSightAPINightly
13. Security Parameter: Data Feed and API Parameter (or whatever parameter your company uses with non-expiring passwords)
14. Password: Whatever you want
15. Force Password Change: unchecked
16. Groups: BitSight API Accounts

## Task 2: Create BitSight API Token

A BitSight API token must be created and utilized within the JavaScript integration applications to connect to BitSight. Below are the steps to create or locate the BitSight API token.

1. Login to BitSight Portal: <https://service.bitsighttech.com/>
2. Click on Gear  icon on top-right of screen
3. Click **Account** option

Graphical user interface, text, application

Description automatically generated

1. Scroll down to **API Token** section
2. Click the **Generate New Token** button

A screenshot of a computer

Description automatically generated with medium confidence

1. Copy the **Current API Token** text for use in the integration applications.

## Task 3: Configuring Integration between Archer and BitSight

The integration applications must be configured correctly to successfully run the data integration.

This integration utilizes several JavaScript applications executed on a scheduled basis to perform the various tasks to pull data from BitSight into Archer via API. This allows organizations utilizing SaaS, Hosted, or on-Prem to utilize the same solution.

Many organizations utilize special enterprise job scheduling software tools such as Tidal, ActiveBatch, BMC Control-M, etc. The steps outlined below demonstrate the configuration with Windows Task Scheduler, however many of the same concepts apply for other scheduling software.

**Important:** Ensure the server running the integrations applications can make outbound API calls to the Internet if you are using a SaaS or Hosted Archer instance. You may need to work with your networking and/or data security teams to update the firewall rules for outbound calls over HTTPS (port 443).

**Steps:**

1. **Install Node.JS on Scheduling Server:**

No matter which job scheduling software you choose to implement, Node.JS must be installed to execute the applications. The latest version of Node.JS is recommended.

* + 1. Log into the server with administrator rights where you will run the JavaScript applications from programmatically.
    2. Download and install the node.js application from <http://nodejs.org>
       1. Choose all default options (or change as necessary)
       2. Regarding “Tools for Native Modules” you do NOT need to check the box to automatically install the necessary tools.
  1. Create Folder and Install Node Packages
     1. Locate or create the folder/path where you want to run the JavaScript applications
        1. *Suggestion/Example: C:\Archer\BitSightIntegration*
        2. *Tip: Avoid using spaces or special characters in your path/folder names*
     2. Install the required node packages with the Node Package Manager (npm)
        1. Open a “Node.js command prompt” from your Windows Start Menu
           1. *Tip: Pin the “Node.js command prompt” to your taskbar*
        2. Change directories to the path/folder created in the step above.
        3. Run the command “npm install request”
           1. *Note: Yes, we are aware the “request” library is deprecated. Archer IRM only allows four specific libraries to be used in JavaScript Transporter data feeds and “request” is one of them. Our plan is to release a version of these applications as JavaScript Transporter data feeds once JST logging is improved in Archer and Archer IRM allows a process for SaaS/Hosted customers to run non-Archer IRM developed code.*
        4. Run the command “npm install xmldom”
        5. Run the command “npm install xml2js”
  2. From the app-pack zip file, place the following files in the folder/path you created above:
     + - 1. 100-BitSightTPPSearch.js
         2. 110-BitSightGetHeadlineRatingsNewLicense.js
         3. 120-ChangeSubscriptions.js
         4. 130-BitSightGetBAAVectors.js
         5. 200-BitSightSubscriptions.js
         6. 210-BitSightGetHeadlineRatingsNightly.js
         7. 220-PublicDisclosures.js
         8. 230-Alerts.js
         9. daily.bat
         10. nightly.bat
         11. sendmailDaily.ps1
         12. sendmailNightly.ps1
  3. Configure **every** JavaScript file with your Archer URL, Archer Instance, Archer API Accounts, Archer paths, and BitSight Token.
     + 1. Note:
          1. It is critical to use the correct API account for each of the JavaScript applications or the session IDs of the daily execution could interfere with the nightly jobs and terminate the longer running jobs.
          2. All JavaScript applications starting with “1” will use the **daily** API account: dfm\_BitSightAPIDaily

100-BitSightTPPSearch.js

110-BitSightGetHeadlineRatingsNewLicense.js

120-ChangeSubscriptions.js

130-BitSightGetBAAVectors.js

* + - * 1. All JavaScript applications starting with “2” will use the **nightly** API account: dfm\_BitSightAPINightly

200-BitSightSubscriptions.js

210-BitSightGetHeadlineRatingsNightly.js

220-PublicDisclosures.js

230-Alerts.js

* + - 1. Edit each .js in any text editor (notepad, notepad++, etc.)
      2. Locate the defaultParams variable (search for “var defaultParams”) and change the following settings to the appropriate setting for your company:
         1. archer\_username - The account you setup for the data feeds/API above.

Example: dfm\_BitSightAPIDaily (for applications 100 to 130) or dfm\_BitSightAPINightly (for applications 200-230)

* + - * 1. archer\_password - Password for the accounts created above.
        2. archer\_instanceName - Case sensitive name of your Archer Instance.

*Example: Dev*

*Note: SaaS/Hosted customers will have an instance number instead of text*

* + - * 1. archer\_webroot - Main URL of your Archer instance with a trailing slash.

*Example:* [*https://archer.mycompany.com/*](https://archer.mycompany.com/)

* + - * 1. bitsight\_token - A valid BitSight token is required to run the solution. See section above to create or locate your BitSight Token.

*Example: “47440143ea9b6c6aac5f873dbd5e551390adc2c5”*

* + - 1. If you wish to enable verbose logging, change the bVerboseLogging variable to true.

Note: Enabling verbose logging is only necessary if you have any errors running the integration applications. Verbose logging will output more log data to help identify and correct any problems. Most issues with integration setup are with outbound connectivity through firewalls if you are connecting to an Archer server in a different location than your scheduling server. We recommend leaving this set to false unless you encounter any issues and need support.

## Task 4: Configure the nightly.bat and daily.bat files

1. Edit the nightly.bat and daily.bat in any text editor (notepad, notepad++, etc.)
2. Locate and change the following settings to the appropriate setting for your company
   1. Change the Archer Instance Name on this line:
      1. set ArcherInstanceName=Dev
      2. *Note: This setting is informational for logging to help determine which instance is having issues should an error occur*
3. At the very bottom of the file, we provide the ability to send an email via the sendmail(daily/nightly).ps PowerShell script if an error is detected. Your enterprise job scheduler may have a different method to send emails based on output from the batch file. The output for a successful execution to the console will be “SUCCESS”. If an error is detected in any of the scripts, the output will show “ERROR: BitSight Nightly Job - Execution Server: *COMPUTERNAME* - Archer Instance: *ArcherInstanceName* - Log file: *logfile*”

If you are interested in using our script, complete the following steps:

* 1. Remove the “REM” before the “PowerShell” text to uncomment the line in both .bat files.
  2. Edit both .ps1 files in any text editor (notepad, notepad++, etc.)
  3. Locate and change the following settings to the appropriate settings within your organization for the mail server, to and from email addresses, the subject line, any changes to the message body, and email security settings:
     1. $emailSmtpServer
     2. $emailSmtpServerPort
     3. $emailFrom
     4. $emailTo
        1. Multiple email addresses are separated by commas.
           1. *Example:* [*me@abc.com,you@abc.com*](mailto:me@abc.com,you@abc.com)
           2. *Suggestion: We suggest you send this email to a generic email inbox where multiple people can see the email rather than a single person.*
           3. *Note: By default, emails are sent to* [*archer.logs@bitsight.com*](mailto:archer.logs@bitsight.com) *so any issues can be addressed quickly in the event the person internally is no longer with the company or the email is invalid.*
     5. $emailMessage.Subject
        1. *Note: You can leave as-is or change to a different format*
     6. $emailMessage.Body
        1. *Note: You can leave as-is or change to a different format*
  4. If your email server requires SSL (highly likely):
     1. Uncomment $SMTPClient.EnableSsl
  5. If your email server requires authentication (highly likely):
     1. Uncomment and set the following fields:
        1. $emailSmtpUser
        2. $emailSmtpPass
           1. Suggestion: You can use the following PowerShell command to create a “secure string” so the password is not stored locally in the file.

Read-Host "Enter Password" -AsSecureString | ConvertFrom-SecureString

* + 1. Uncomment the $SMTPClient.Credentials row
  1. Save the .ps1 file

1. Save the .bat file

## Task 5: Setup Job Scheduling

Some organizations are required to use enterprise job schedulers such as Tidal, ActiveBatch, BMC Control-M, etc. BitSight nor Tutela cannot provide support for those tools, however the settings below for Windows Task Scheduler may help you with the necessary settings in your organization.

1. Log into the Windows server with administrator rights where you will run the scripts from programmatically
2. Start the **Windows Task Scheduler** application on the server from the Start Menu
3. Create folders for Archer jobs
   1. Right-click **Task Scheduler Library** and click **New Folder**
   2. Type “Archer-BitSight” and click **OK** button

**Create Nightly Job**

1. Right-click the “Archer-BitSight” folder and click **Create Task…**
2. General Tab Settings:
   1. Name: Archer BitSight Nightly Jobs
   2. Description: This task launches the BitSight applications to process nightly jobs to replicate BitSight Security Ratings in the Archer platform from the BitSight API to enable our organization to effectively manage 3rd party security risk.
   3. Click the **Change User or Group…** button and set to a user account which has administrator or Logon as Batch privileges
      1. Note: You will likely need to setup an appropriate service account for this with a non-expiring password or a method to change the password and update the password in this task periodically.
   4. Change the radio button selection to **“Run whether user is logged on or not”**
   5. Set **Configure for** to current operating system
3. Triggers Tab Settings:
   1. Click **New…** button
   2. Begin the task: On a schedule
   3. Settings:
      1. Daily
      2. Start: Current Day at whatever time make sense.
         1. Example: 4/1/2022 at 6:00am
         2. Based on BitSight server processing, we would suggest starting this processing no earlier than 5am Eastern Time Zone (UTC -5).
      3. Recure every: 1 days
   4. Advanced Settings:
      1. Stop task if it runs longer than 8 hours: Checked
      2. Enabled: Checked
   5. Click **OK** button
4. Actions Tab Settings:
   1. Click **New…** button
   2. Action: **Start a program**
   3. Program/Script: [Full path to the batch file.]
      1. *Example: C:\Archer\*BitSight*\nightly.bat*
   4. Start in (optional): [Full path of your batch file.]
      1. *Example: C:\Archer\*BitSight*\*
   5. Click **OK** button
5. Conditions Tab Settings:
   1. Network: Start only if the following network connection is available:
      1. **Checked**
      2. Set dropdown to **Any Connection**
6. Settings Tab Settings:
   1. Allow task to be run on demand: **Checked**
   2. Stop the task if it runs longer than 8 hours: **Checked**
   3. If the running task does not end when requested, force it to stop: **Checked**
   4. If the task is already running, then the following rule applies: **Do not start a new instance**
7. Click the **OK** button to save your new task
8. Test the scheduled job
9. Right-click the scheduled job and click **Run**

**Create Daily Job**

1. Right-click the “Archer-BitSight” folder and click **Create Task…**
2. General Tab Settings:
   1. Name: Archer BitSight Daily Jobs
   2. Description: This task launches the BitSight applications to process daily jobs to replicate BitSight Security Ratings in the Archer platform from the BitSight API to enable our organization to effectively manage 3rd party security risk.
   3. Click the **Change User or Group…** button and set to a user account which has administrator or Logon as Batch privileges
      1. Note: You will likely need to setup an appropriate service account for this with a non-expiring password or a method to change the password and update the password in this task periodically.
   4. Change the radio button selection to **“Run whether user is logged on or not”**
   5. Set **Configure for** to current operating system
3. Triggers Tab Settings:
   1. Click **New…** button
   2. Begin the task: On a schedule
   3. Settings:
      1. Daily
      2. Start: Current Day at whatever time make sense.
         1. Example: 4/1/2022 at 6:02am
         2. *Tip: We suggest setting at a slightly different minute than the nightly to offset the execution times. In the case above we suggest 2 minutes after 6AM.*
         3. *Since this job runs every x minutes per day, there is no suggested time to run this job. You may decide to run it more frequently during the day to give a more “real-time” experience for your end-users.*
      3. Recure every: 1 days
   4. Advanced Settings:
      1. Repeat task every: 5 minutes for a duration of 1 day
         1. Note: You can choose to run this at whatever interval makes sense and is acceptable by your business partners. Some organizations have more flexibility to run this job more frequently during business hours and less often at off-hours. Training to your end-users will inform them on what they can expect with the solution as far as execution times. Perhaps add this information into to help text or as a text box on the BitSight Portfolio application. Setting the expectation of your users will reduce support calls to the Archer team asking why processing hasn’t completed yet.
      2. Stop task if it runs longer than 1 hour: Checked
      3. Enabled: Checked
   5. Click **OK** button
4. Actions Tab Settings:
   1. Click **New…** button
   2. Action: **Start a program**
   3. Program/Script: [Full path to the batch file.]
      1. *Example: C:\Archer\*BitSight*\daily.bat*
   4. Start in (optional): [Full path of your batch file.]
      1. *Example: C:\Archer\*BitSight*\*
   5. Click **OK** button
5. Conditions Tab Settings:
   1. Network: Start only if the following network connection is available:
      1. **Checked**
      2. Set dropdown to **Any Connection**
6. Settings Tab Settings:
   1. Allow task to be run on demand: **Checked**
   2. Stop the task if it runs longer than 1 hour: **Checked**
   3. If the running task does not end when requested, force it to stop: **Checked**
   4. If the task is already running, then the following rule applies: **Do not start a new instance**
7. Click the **OK** button to save your new task
8. Test the scheduled job
9. Right-click the scheduled job and click **Run**

## Task 6: Security and Hardening

### BitSight Token

The BitSight API Token used in the integration has the same privilege as the user who created the token. It is suggested to protect the API token as you would a username and password. While the API token cannot login to the BitSight portal directly, any available functionality via the API could be used.

### Least Privilege Model

The Archer API security credentials used in this integration follow the least privilege access model by design. The Archer API accounts can only:

1. Read and update Third Party Profile records
2. Create, Read, and Update BitSight Portfolio records
3. Create, Read, and Update BitSight Alerts and Breaches records

### API Integration Code Security

Archer API security credentials and the BitSight Token are accessible by anyone who can read the files in the integration code folder. It is suggested to restrict the access of the folder to the least amount of users as possible on a need to know basis.

# Chapter 5: Upgrading BitSight Security Ratings Integration

## Upgrading from Version 1 integration:

If you have used the first version (V1) of the BitSight Security Ratings Archer integration, there is no direct upgrade path. Version 2.0 was rewritten from the ground up and significantly enhanced in all aspects of the solution from functionality, information available, and end-user experience.

Organizations may consider retaining the old BitSight fields manually created in Third Party Profile for historical purposes; especially if risk-based decisions were made based on that data. Or you can remove those legacy fields entirely after utilizing the 2.0 version for a while confirming the new solution is meeting your organization’s needs.

## Upgrading to 2.3 from Versions 2.0 through 2.2:

If you are upgrading from Version 2.0 through 2.2 of the BitSight integration, below are the steps to minimize the impact and time to deploy the upgrade. While it appears there’s a lot of steps, they are fairly simple and quick.

**Steps:**

1. Create a new Values List field named “**BitSight Tier**” in the **BitSight Portfolio** application.

a. Add the Tier values exactly from your BitSight Portal (Risk Program Setup 🡪 Tier Settings) as values in the new values list field.

b. After saving the field, **copy** the field GUID text from the General Information section. We will use that GUID later. Below is a screenshot where to find the GUID:

A screenshot of a computer

AI-generated content may be incorrect.

c. Add the field to the BitSight Portfolio layout to a location you choose and save the layout.

2. On your API integration server with the scheduled jobs, rename your existing **200-BitSightSubscriptions.js** file to **z200-BitSightSubscriptionsV2.0.js** (or something else to indicate it is the older version). Keep this file because we want to copy some the configuration settings.

3. In the integration package file, locate and copy the **200-BitSightSubscriptions.js** file into the folder with your existing scheduled job .js files.

4. Open the **z200-BitSightSubscriptionsV2.0.js** file(or whatever you renamed it to) AND the new **200-BitSightSubscriptions.js** file in Notepad or another text editor.

5. Update the new **200-BitSightSubscriptions.js** file and change any of the settings/text within the **var defaultParams = {** block of code which should be near line 67 of the code. These were all the settings you initially configured such as “archer\_username”, “bitsight\_token”, etc. You can probably copy/paste entire rows from the old file if you feel comfortable doing that, otherwise update the settings one at a time. Make sure not to replace the entire section off defaultParams because new rows/settings were added in the new file to support Tier data. Here are the key fields to update or confirm:

A screenshot of a computer screen

AI-generated content may be incorrect.

6. Replace and update the **archer\_bitsightportfolio\_tier\_guid** setting within defaultParams with the BitSight Tier field GUID from Step 1.b above for your Archer instance. Below is the value to update:

A computer screen with text and numbers

AI-generated content may be incorrect.

7. Update the **BitSight Portfolio** action that makes the **BitSight Tier** field read-only. Edit the **BitSight Portfolio** application in Archer. On the **Designer** tab and the **Actions** sub-tab, locate and edit the **BitSight Populated Info - RO** action. Set the **BitSight Tier** field to **“Read Only”** and **Save** the action settings.

A screenshot of a computer

AI-generated content may be incorrect.

8. Test the integration code and new settings by running the job.

* 1. Login to your integration server that runs your BitSight integration.
  2. Open a Node.js Command Prompt

A screenshot of a computer

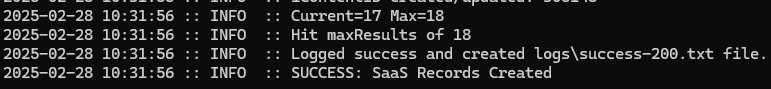
AI-generated content may be incorrect.

* 1. Change directories to the folder with your .js files for the integration.
  2. Run the following command: node 200-BitSightSubscriptions.js

A black and white text

AI-generated content may be incorrect.

* 1. The last line should look like this if it was successful:



* + 1. If an error occurred, review the steps above to ensure the config settings and tasks were updated successfully and accurately.
  1. In Archer, create a temporary report to view and confirm the **BitSight Tier** field is populated with the tiers as you expect from BitSight.

A screenshot of a computer

AI-generated content may be incorrect.

9. If you have multiple Archer instances, you can package the BitSight Portfolio application into your other instances and the BitSight Tier guid will be the same across instances. Then ensure you update the .js files appropriately for the other instances. Test each instance to ensure updates are working as expected.

# Chapter 6: Using BitSight Security Ratings

## Additional Configuration

Many Archer customers continue to further configure/customize their Archer implementations to meet their organization’s unique needs and improve their risk posture.

These changes typically include:

1. Various verbiage/taxonomy changes
   1. Note: Caution is needed around integration points. Contact Tutela Solutions for assistance to ensure compatibility.
2. Security permissions with additional access roles
3. Customized email notifications upon certain events/triggers
4. New or updated dashboards and reports
5. Unique calculations of risk into Third Party Profile (TPP)
6. Additional linkage to other applications in Archer such as Incidents, Findings, Action Plans, and/or Exceptions, etc.
7. API integrations and/or Data Feeds to automate creation of records such as Incidents, Findings, etc. within Archer or integration outside of Archer to another system.

## Access Groups and Roles

The following end-user groups/roles are available by default:

1. BitSight Admins

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Component** | **Create** | **Read** | **Update** | **Delete** | **Import** |
| Third Party Profile | X | X | X |  | X |
| BitSight Portfolio | X | X | X | X | X |
| BitSight Alerts and Breaches | X | X | X | X | X |

1. BitSight Users

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Component** | **Create** | **Read** | **Update** | **Delete** | **Import** |
| Third Party Profile | X | X | X |  | X |
| BitSight Portfolio |  | X | X |  |  |
| BitSight Alerts and Breaches |  | X |  |  |  |

*Note: Additional record permissions may need to be setup in TPP based on your organization’s security access model. Typically, the Relationship Manager field has access to the TPP record. Given BitSight’s usage for managing risk, you are likely to use the Risk Analysts field. Please review the* ***Access Considerations*** *section below for additional implementation ideas to segment access further.*

## BitSight Licensing Overview

The use of the BitSight Archer integration will depend on your organization’s subscription and/or licensing model. Most organizations are already using BitSight’s Total Risk Monitoring (TRM) and Risk Monitoring (RM) subscription services. These subscriptions are managed in the BitSight Portal. While initial subscriptions or cancellations are still performed in the BitSight Portal, this integration allows you to change between TRM and RM easily.

The BitSight Assessment Accelerator (BAA) is a licensing model offered by BitSight to perform initial risk evaluations and then obtain detailed risk vectors. The BAA is only available via API and this version of the BitSight Archer integration supports this enhanced model. This is particularly helpful for organizations evaluating multiple vendors before deciding which ones to pursue further without having to use a full TRM or RM license.

## BitSight Alerts Setup

Alert information that flows into Archer is based on the configuration in the BitSight Portal for the user who generated the BitSight API Token. Alerts are highly customizable and provide threshold settings for each of the types of alerts and by tier of the company monitored.

Note: If you want BitSight alert information to flow into Archer, you must setup the alert configuration in the BitSight Portal. Only alerts generated in the past day and with the settings at the time of the retrieval are obtained and displayed in Archer. Refer to the BitSight Online Help for assistance configuring the alerts in the BitSight Portal.

## Existing BitSight Customers

**Overview:**

If you are an existing BitSight customer with a portfolio of companies/vendors in the BitSight Portal, the Nightly.bat job will import all your currently subscribed companies/vendors from your portfolio into Archer’s BitSight Portfolio application. Alerts and security disclosures are also populated from the past day. This applies to all companies in your portfolio with a Total Risk Monitoring or Risk Monitoring subscription.

**Steps:**

1. Run the Nightly.bat script manually
2. Map/Link Third Party Profile records to BitSight Portfolio records
   1. There are many ways to do this based on the data in your Third Party Profile depending on the number of records you have in your TPP, type of data in your TPP, and/or the number of BitSight companies in your portfolio.
      1. If you have a “small” number of TPP records:
         1. Utilize the BitSight TPP Listing inline edit report to link your TPP to the BitSight portfolio record. Steps:
            1. Click the **BitSight** Dashboard
            2. Click the **BitSight TPP Listing** link in the BitSight Links iView
            3. For each TPP you want to link to a BitSight Portfolio, use inline edit to edit the BitSight Portfolio field.

Search or navigate to the appropriate record

Select the checkbox of the correct portfolio record

Click the OK button

Click the save icon () to the right of the record to commit your changes

Repeat these steps for each TPP you want to link to the BitSight Portfolio records.

* + 1. If you have a “small” number of BitSight Company records/subscriptions:
       1. An alternative method would be to start from the BitSight Portfolio records automatically loaded into Archer. Steps:
          1. Click the dropdown icon on the BitSight dashboard
          2. Click the BitSight Portfolio application
          3. Enable Inline Editing
          4. For each Portfolio you want to link to a TPP, use inline edit to edit the Related Third Party Profile field.

Search or navigate to the appropriate record

Select the checkbox of the correct TPP record

Click the OK button

Click the save icon () to the right of the record to commit your changes

Repeat these steps for each Portfolio you want to link to the TPP records.

* + 1. If you have many TPP records and/or BitSight company subscriptions/records:
       1. You may want to consider performing a data import to link between TPP and BitSight Portfolio records:
          1. Create a report of applicable TPP records with fields to help perform matching and appropriate filters to restrict applicable TPP records.

Tip: Ensure a unique field is used for the import process such as the Third Party ID field which is the unique tracking ID for TPP records.

* + - * 1. Create a report of applicable BitSight Portfolio records with fields to help perform matching and appropriate filters to restrict applicable BitSight Portfolio records.

Tip: Ensure the “BitSight Company Name” field is included in the export report for matching.

* + - * 1. Utilize various Excel functionality such as vlookup or manual data entry to perform appropriate matching between the records to create a .csv import file.
        2. Ultimately, you need to create a .csv import file with the following fields minimum:

Unique ID from TPP (Example: Third Party ID)

BitSight Company Name

* + - * 1. Perform a Data Import into TPP

Upload the .csv import file

*The rest of the default options are acceptable in Step 1*

Click **Next** button to continue to Step 2

Set Import Type to Update Existing Records

Change Lookup Field(s) to Third Party ID (or whatever key field you plan to use for matching TPP records)

Ensure proper mapping of field you want to import (you only need to import the TPP key field and BitSight Company Name)

Change the BitSight Company Name field mapping option to: **BitSight Portfolio (BitSight Company Name)**

Click **Next** button to Continue

Click **Import** button to import the records

## BitSight Dashboard

The BitSight Dashboard includes a number of quick links to assist your usage of the solution. Ensure you have access to the dashboard before continuing.

Graphical user interface

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## High Level Process Overview

The usage of the BitSight Security Ratings solution in Archer depends on the types of BitSight subscriptions and licensing your organization purchased from BitSight. Please follow the instructions based on your organization’s BitSight agreement.

### Both TRM/RM and BAA

The process below outlines the suggested full process for organizations with both TRM/RM subscriptions and BAA tokens/licensing:

1. Create vendor record in TPP with **Domain** field populated *(ex. bitsight.com)*
   1. There are many ways to create a TPP, but the BitSight dashboard includes a quick link **Create New Third Party Profile**
2. Backend processes automatically create one or more BitSight Portfolio records in Archer
   1. If only 1 record is returned, the linkage between the BitSight Portfolio record to TPP is automatically established
   2. If multiple records are returned, you will map the desired BitSight Portfolio record using a report from TPP and use inline edit to map to the BitSight Portfolio
3. Determine next action:

If you are evaluating the vendor compared to other vendors for an initial search/exploration on their security posture, then you will likely use the headline rating option first. If your organization already has an existing relationship with this vendor and wish to monitor the risk they pose to your organization and therefore TRM or RM may be more appropriate as your first step.

* 1. Only obtain headline rating
     1. Use the **BitSight Assessment Accelerator (BAA): Headline Ratings** inline edit report from the BitSight dashboard to request headline ratings for specific companies
        1. Note: Only companies in the BitSight Portfolio eligible for headline ratings are shown:
           1. Does not have a current TRM/RM subscription
           2. Does not already have an active headline rating license
           3. BitSight Portfolio is linked to a TPP record
     2. The backend process will obtain the headline rating for your review/reporting
        1. Headline ratings will continue to update automatically on a nightly basis for 1 year.
     3. If the rating is unacceptable, the process may end here for this company. If you want to retrieve additional detailed information, you could skip BAA Vectors and go directly to TRM/RM.
     4. If you want a one-time pull of the BAA Risk Vectors, use the **BitSight Assessment Accelerator (BAA): Risk Vectors** report from the BitSight dashboard for a list of companies eligible for BAA.

Perform the following steps:

* + - 1. **Edit** the selected BitSight Portfolio record
      2. Change **Pull Today's BitSight Risk Vectors?** To “Yes”.
         1. Note: This will use one of your BAA tokens
      3. Click the **Save and Close** button
      4. Allow background processing to complete
      5. Risk vectors will be available in the **Risk Vectors** section for review.
  1. Subscribe to TRM or RM
     1. Follow the detailed steps in the section below named **Subscribing to TRM or RM**

### TRM and/or RM Subscriptions Only

If your organization only intends to use TRM and/or RM subscriptions, please review the section **Appendix E: Disable BAA Functionality** in the Appendix. This section provides instructions to disable BAA functionality to improve the User Interface and User Experience.

The process below outlines the process for organizations with only TRM and/or RM subscriptions:

1. Create vendor record in TPP with **Domain** field populated *(ex. bitsight.com)*
   1. There are many ways to create a TPP, but the BitSight dashboard includes a quick link **Create New Third Party Profile**
2. Backend processes automatically create one or more BitSight Portfolio records in Archer
   1. If only 1 record is returned, the linkage between the BitSight Portfolio record to TPP is automatically established
   2. If multiple records are returned, you will map the desired BitSight Portfolio record using a report from TPP and use inline edit to map to the BitSight Portfolio
3. Subscribe to TRM or RM
   1. Follow the detailed steps in the section below named **Subscribing to TRM or RM**

### BAA Only

If your organization only intends to use BAA Licensing, please review the section **Appendix F: Disable TRM/RM Functionality** in the Appendix. This section provides instructions to disable BAA functionality to improve the User Interface and User Experience.

The process below outlines the process for organizations with only BAA licenses:

Note: BAA Only customers will not be able to access the BitSight Portal links on the BitSight Portfolio record page in the General Information section. Ask your Archer administrator to remove those links from view until subscriptions are added to your BitSight agreement.

1. Create vendor record in TPP with **Domain** field populated *(ex. bitsight.com)*
   1. There are many ways to create a TPP, but the BitSight dashboard includes a quick link **Create New Third Party Profile**
2. Backend processes automatically create one or more BitSight Portfolio records in Archer
   1. If only 1 record is returned, the linkage between the BitSight Portfolio record to TPP is automatically established
   2. If multiple records are returned, you will map the desired BitSight Portfolio record using a report from TPP and use inline edit to map to the BitSight Portfolio
3. Only obtain headline rating
   1. Use the BAA Headline Ratings inline edit report to request headline ratings
   2. The backend process will obtain the headline rating for your review/reporting
      1. Headline ratings will continue to update automatically on a nightly basis for 1 year.
   3. If the rating is unacceptable, the process may end here. If you want to retrieve additional information, continue to the next step to obtain risk vectors.
4. If you want a one-time pull of the BAA Vectors, use the BitSight Assessment Accelerator (BAA) Risk Vectors report from the BitSight dashboard for a list of companies eligible for BAA Vectors OR go directly to the BitSight Portfolio record. Perform the following steps:
   1. **Edit** the BitSight Portfolio record
   2. Change **Pull Today's BitSight Risk Vectors?** To “Yes”.
      1. Note: This will use one of your BAA tokens
   3. Click the **Save and Close** button
   4. Allow background processing to complete
   5. Risk vectors will be available in the **Risk Vectors** section for review.

### Subscribing to TRM or RM

The integration in Archer allows you to quickly locate the company record in the BitSight Portal to subscribe to a company’s risk information.

Note: This assumes you have the rights to manage the BitSight Portal for your company.

Note: It is important to perform the steps with the appropriate user account since the backend processing utilizes a specific API Token associated to a user account.

1. **View** the desired BitSight Portfolio company record
2. Click the **BitSight Portal Subscription Link** to open the BitSight Portal and subscribe to TRM or RM

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1. Steps within the BitSight Portal:
   1. Click the **Subscribe** button to see a list of options.

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* 1. Click your desired level of monitoring.

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* 1. Click the **Confirm** button to use one of your subscriptions.

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Description automatically generated

* 1. Select the appropriate options for Company Relationship, Life Cycle Stage, and Tier, then click the **Save and View Company** button

Graphical user interface, text

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1. The overnight backend process will obtain the appropriate data for your review/reporting
2. TRM and RM subscriptions will continue to update automatically on a nightly basis

### Switching From TRM to RM (Or Switching From RM to TRM)

The integration in Archer allows you to switch subscriptions between TRM and RM and vice versa. Below are the steps to switch subscriptions:

1. **Edit** the selected BitSight Portfolio company record
2. Change the **Change Subscription Type** field to either “Risk Monitoring” or “Total Risk Monitoring” (options are based on your current subscription).
   1. *Example:*

*Graphical user interface, text

Description automatically generated*

* 1. Note: If you save the record, you will switch subscriptions upon next scheduled backend job synchronization.

1. Click the **Save and Close** button
2. Allow background processing to complete
3. The subscription will change to the selected type (assuming available subscriptions for your account).

### Unsubscribing TRM or RM

The integration in Archer allows you to quickly locate the company record in the BitSight Portal to unsubscribe from a company’s risk information.

Note: This assumes you have the rights to manage the BitSight Portal for your company.

Note: It is important to perform the steps with the appropriate user account since the backend processing utilizes a specific API Token associated to a user account.

1. **View** the desired BitSight Portfolio company record
2. Click the **BitSight Portal Subscription Link** to open the BitSight Portal

Graphical user interface, text, application

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1. To unsubscribe from TRM or RM within the BitSight Portal:
   1. Click on the company name

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* 1. Click the **Actions** button

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* 1. Click the **Unsubscribe** option

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* 1. Click the **Confirm** button

Graphical user interface, text, application

Description automatically generated

1. The overnight backend process will update the subscription type to Not Subscribed

# Appendix A: Certification Environment

**Date Tested:** 4/15/2022

|  |  |  |
| --- | --- | --- |
| Product Name | Version Information | Operating System |
| Archer | 6.10 P1 | Windows |
| BitSight Security Ratings | 2.0 | Windows |

# Appendix B: Access Considerations

The implementation provided does not use record permission fields and is only secured via group/role access. Therefore, all records in the BitSight Portfolio and Alerts applications are open to all users in the BitSight Admins and Users groups.

You may want to consider adding inherited record permissions (IRP) from TPP to restrict access to specific BitSight Portfolios and Alerts. This will help show appropriate records to your users in dashboards and reports. Perhaps you want to allow Relationship Managers to view the BitSight ratings and alert, but not edit any of the fields in the BitSight Portfolio. You can update their role to allow read access to the BitSight applications and then inherit that user’s access into BitSight Portfolio with an IRP. You will need to also inherit into the BitSight Alerts and Breaches application.

If you implement IRPs, you will want to set up an automatic record permission to allow appropriate access to your BitSight Admins and Users groups in both BitSight applications.

# Appendix C: Known Future Improvements

1. Ability to load all Public Disclosures/Security Breaches for a company when added to your portfolio into Archer.
2. Ability to view trendline graphic and highlight information.
3. BitSight Assessment Accelerator questionnaire answer pre-population.

# Appendix D: Frequently Asked Questions (FAQ)

**Q: What happens to the vector information if I switch from TRM to RM or if we utilize a BAA Risk Vector token?**

A: Risk vector information will remain visible for users. A warning message will show up to inform you the risk vectors are potentially dated and no longer representative of the risk the company poses to your organization. The following is an example of the message:

Graphical user interface, text, application

Description automatically generated

**Q: How long does it take to process changes to create BitSight Portfolio records, obtain headline ratings, or obtain BAA Vector data?**

A: Your organization will define the frequency of these backend processing jobs. Contact your Archer administrator and ask what about the frequency. Some organizations run the jobs every 5 minutes, others 1 hour, and some only 1 time per day.

**Q: How long does it take to perform the nightly job to pull all TRM/RM, headline ratings, risk vectors, alerts and/or security incidents/Public disclosures?**

A: The processing will vary per organization based on the number of subscriptions, type of subscriptions, location of Archer servers, location of scheduling server, network speed, nightly job server processing speed, devices between the servers, other processing in Archer, etc. Expect to see less than 1 second per company monitored for all data to process in the nightly jobs.

**Q: Why aren’t all companies able to get Headline Ratings in the “BitSight Assessment Accelerator (BAA): Headline Ratings” report?**

A: Only companies in the BitSight Portfolio eligible for headline ratings are shown:

1. Does not have a current TRM/RM subscription
2. Does not already have an active headline rating license
3. BitSight Portfolio is linked to a TPP record

**Q: Why aren’t all companies able to get Risk Vectors in the “BitSight Assessment Accelerator (BAA): Risk Vectors” report?**

A: Only companies in the BitSight Portfolio eligible for BAA Risk Vectors are shown:

1. Does not have a current TRM/RM subscription
2. Has an active (unexpired) headline rating license
3. BitSight Portfolio is linked to a TPP record

**Q: What happens if I select “Pull Today’s BitSight Risk Vectors” twice in the same day? Will it use an additional BAA token license?**

A: If you happen to run the job to pull the risk vectors more than one time within 24 hours, you will not use an additional BAA token license. The job will update any risk vector changes detected.

**Q: Why are the Alerts and Security Incidents/Public Disclosures in the same ODA?**

A: To make the most efficient use of Archer ODA licensing for your organization, we use DDEs to show/hide appropriate fields for each type of BitSight event. Reporting is based on the Record Type and shows the pertinent information. Due to the fact there are many alerts and security incidents per company, this application needed to be separate than the BitSight Portfolio application.

**Q: Can I retire the BitSight Alerts and Breaches ODA if I’m not using TRM or RM subscriptions?**

A: Yes, if you have no intention of using the TRM or RM subscriptions which pull the alerts and security breaches/public disclosures, then you can retire the ODA. You can always use it later if desired. If you plan to retire the ODA, we suggest also inactivating the following .js files by commenting out code in the nightly.bat file related to the 220 and 230 applications.

**Q: The Tier Names from BitSight are not being populated in the BitSight Portfolio records for some or all records?**

A: Ensure the BitSight Tier field has values in the values list that match exactly with the Tier Names in the BitSight Portal including case and spaces. Ensure you’re using version 2.3 or later of the BitSight and Archer Integration. If upgrading from the BitSight and Archer Integration 2.2 or earlier, review all the steps from the Upgrade section in Chapter 5.

# Appendix E: Disable BAA Functionality

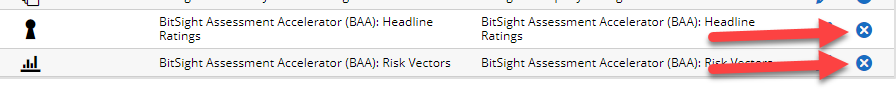
If your organization is only using TRM and/or RM subscriptions, the following administrative steps will remove the BAA licensing functionality to improve the User Interface and User Experience.

1. Remove links in the “BitSight Links” iView.
   1. Click on the **BitSight** workspace.
   2. Locate the **BitSight Links** iView and click the three dot menu on the right.

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* 1. Click **Edit Properties** option.
  2. Click the blue X on the right to remove the following links:



* 1. Click the **OK** button to save.
  2. Optionally adjust the size of the iViews to look appealing.

1. Update the nightly.bat script.
   1. Make a backup copy of the nightly.bat file.
   2. Edit the nightly.bat file.
   3. Delete or comment all rows that deal with the “210” script.
   4. Save the nightly.bat file.
2. Update the daily.bat script.
   1. Make a backup copy of the daily.bat file.
   2. Edit the daily.bat file.
   3. Delete or comment all rows that deal with the “110 and 130” scripts.
   4. Save the daily.bat file.

# Appendix F: Disable TRM/RM Functionality

If your organization is only using BAA licensing, the following administrative steps will remove the subscription functionality to improve the User Interface and User Experience.

1. Manage the **BitSight Portfolio** application in Application Builder and perform the following steps:
   1. In the **General Information** section, move/drag the **BitSight Portal Company Overview** field into the debug section or off layout.
   2. In the **General Information** section, move/drag the **BitSight Portal Subscription Link** field into the debug section or off layout.
   3. In the **Alerts** section, move/drag all the fields into the debug section or off layout.
   4. Delete the **Alerts** section.
2. Manage the **BitSight Alerts and Breaches** application in Application Builder and perform the following steps:
   1. Click on the Properties tab of the application
   2. Change **Status** to “Retired”
3. Click on the **BitSight** workspace and remove the following iViews:
   1. Critical Alerts Last 30 days by Company
   2. Rating Changes Last 90 Days
   3. Recent Security Incidents/Breaches
   4. Security Incidents/Breaches Drill
4. Update the nightly.bat script.
   1. Make a backup copy of the nightly.bat file.
   2. Edit the nightly.bat file.
   3. Delete or comment all rows that deal with the “200, 220, and 230” scripts.
      1. *Note: The “210” script is the only applicable functionality for BAA only users*
   4. Save the nightly.bat file.
5. Update the daily.bat script.
   1. Make a backup copy of the daily.bat file.
   2. Edit the daily.bat file.
   3. Delete or comment all rows that deal with the “120” script.
   4. Save the daily.bat file.