ARCHER®
SUMMIT 2025

In this hands-on session, you'll explore the latest and greatest updates—like powerful new dashboards and record experience.

URL: https://80075.se.archerirm.us

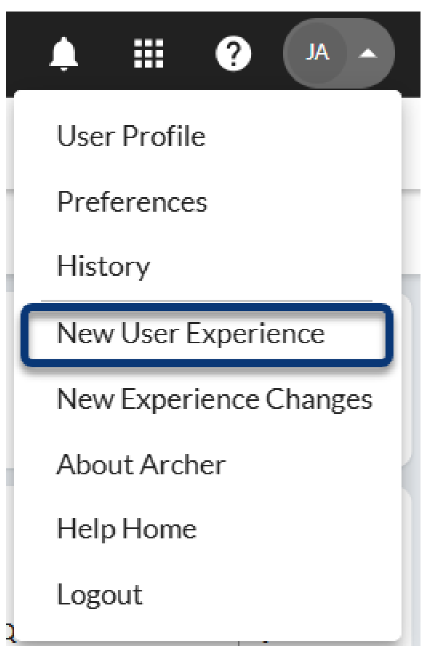
Username: Sum<#> Provided by the Presenter Max 50

Password: Ngrx2025!

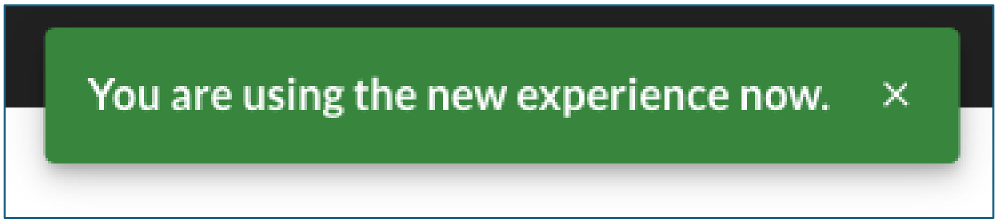
End User Enhancements – Front of House

Switching from Classic Navigation to NextGen Experience

Once logging into the platform on the top right-hand side open the user properties and select "New User Experience". This will switch you from the Classic (current) Archer user experience to the NextGen Risk Experience/New User Experience.

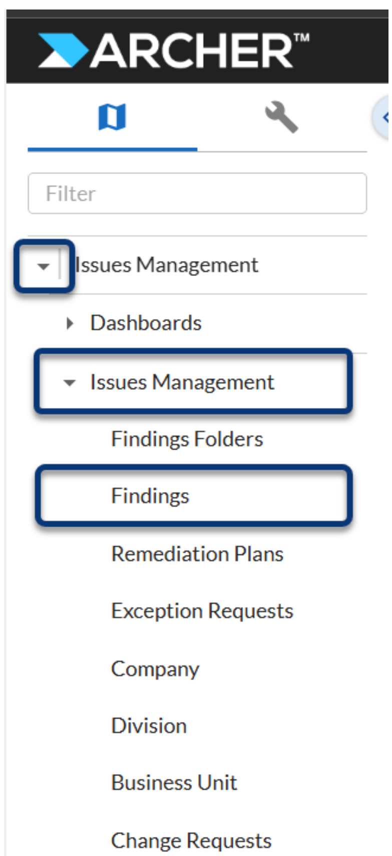


Once you switch to the Next Gen User Experience you will be shown an alert letting you know that you are now in the New Experience

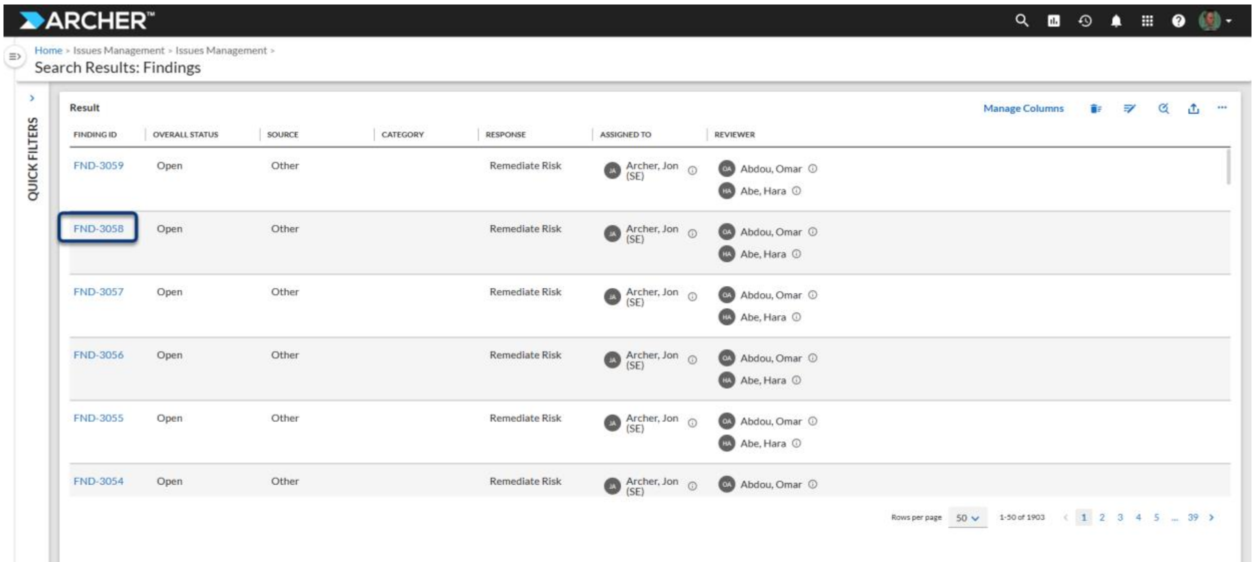


Record Page - Guided Tour

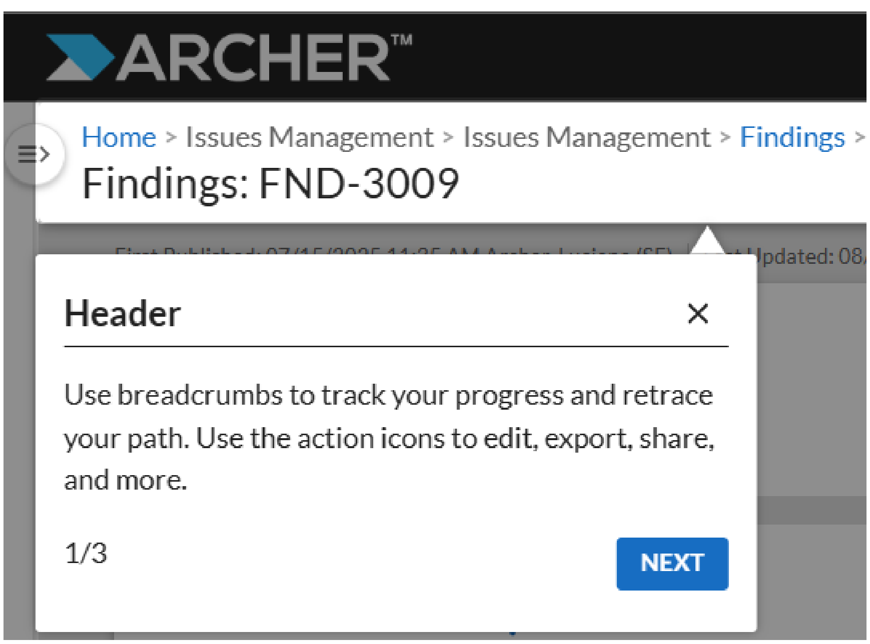
In the Left-Hand navigation panel open up the Issues Management Workspace and the Issues Management Solution and click on the Findings application to open up a listing of Findings

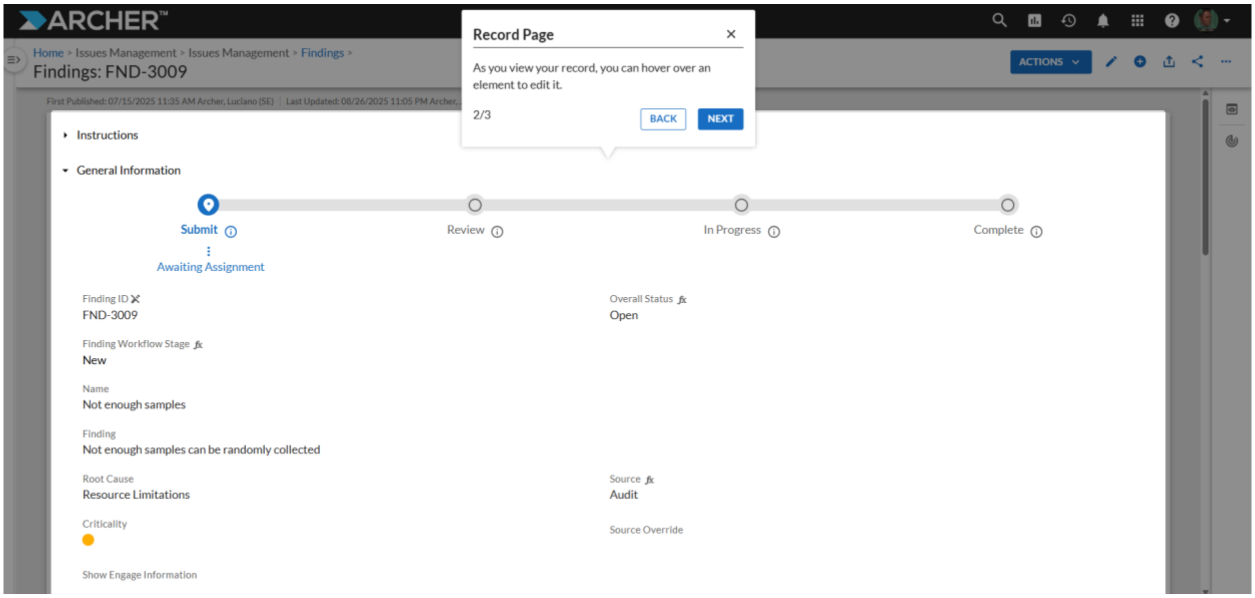


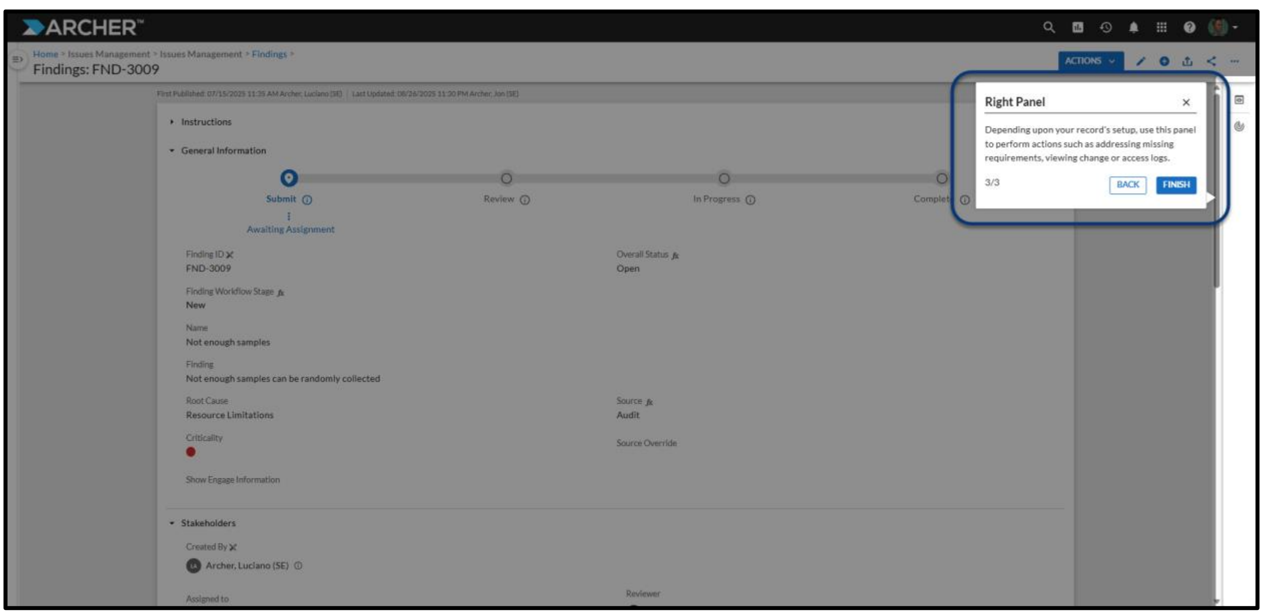
You will now notice the updated Report listings page! We will come back to this later in the lab. For now, click on the "FND - **XXXX**" Finding. (Provided to you by presenter).



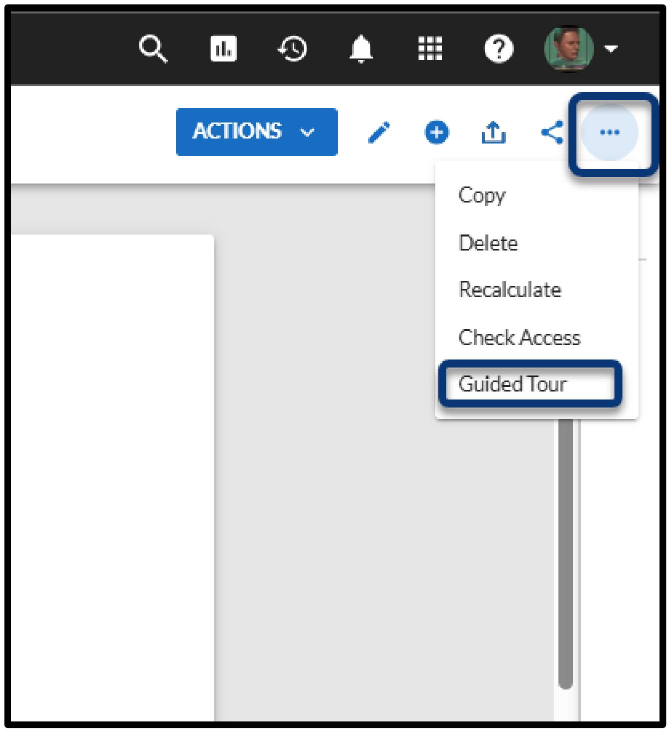
Upon opening the record, you will immediately be brought to a Guided Tour. This is to help highlight some new features and capability that you can access within the record. Click "Next" through each one to see the next (total of 3)







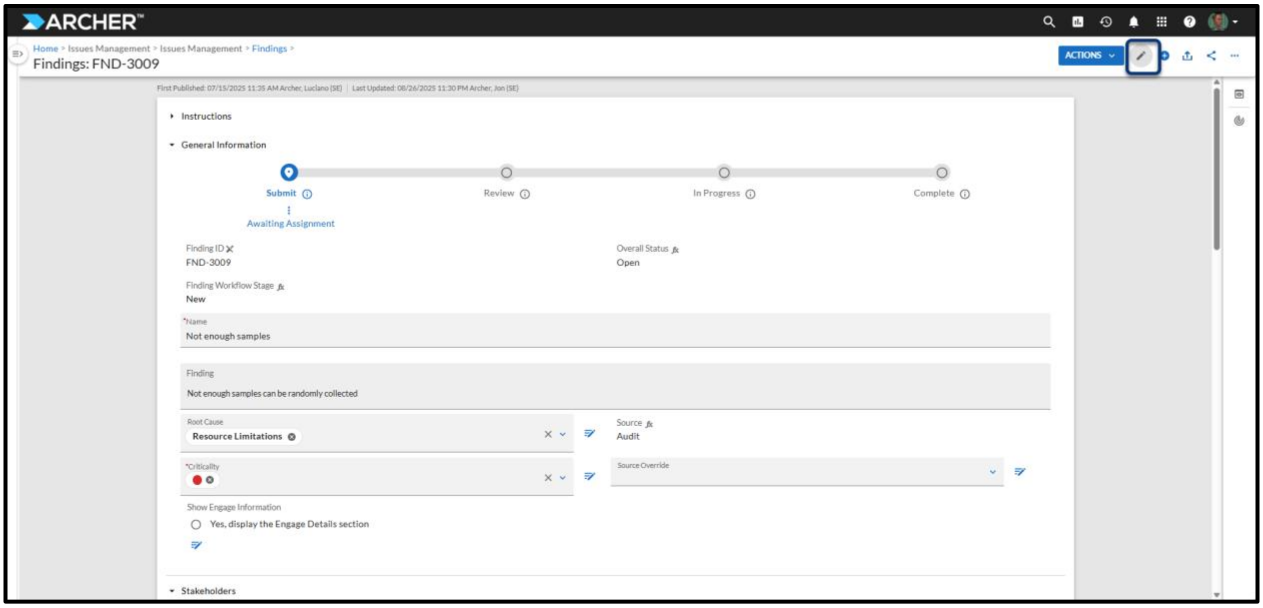
The guided tour can be accessed at any time within the record by clicking on the "…" at the top right of each record and clicking on "Guided Tour"



Record Page – Full Page and Independent Field Edit

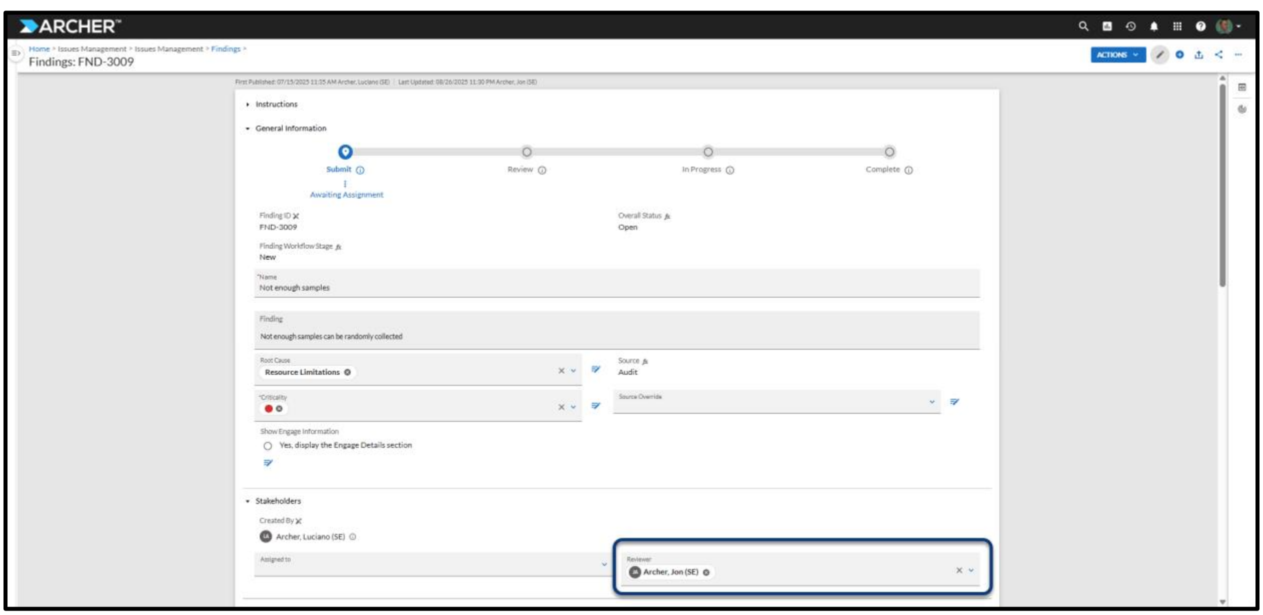
When editing a record, Archer users now have the ability to edit the entire record, or specific fields within the record itself.

To edit the full page, users can click on the pencil icon at the top right hand side of the record



To edit individual fields, users can simply hover over the field and you will see that Archer reacts to your hover by turning the field and contents a darker grey colour. If you click into the field, it will then become editable.

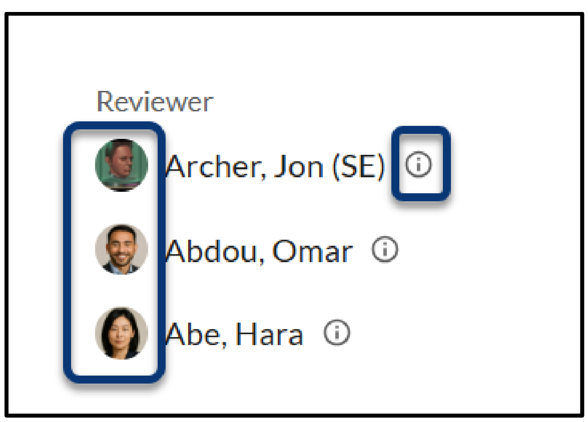
Click on Executive Team to edit the field



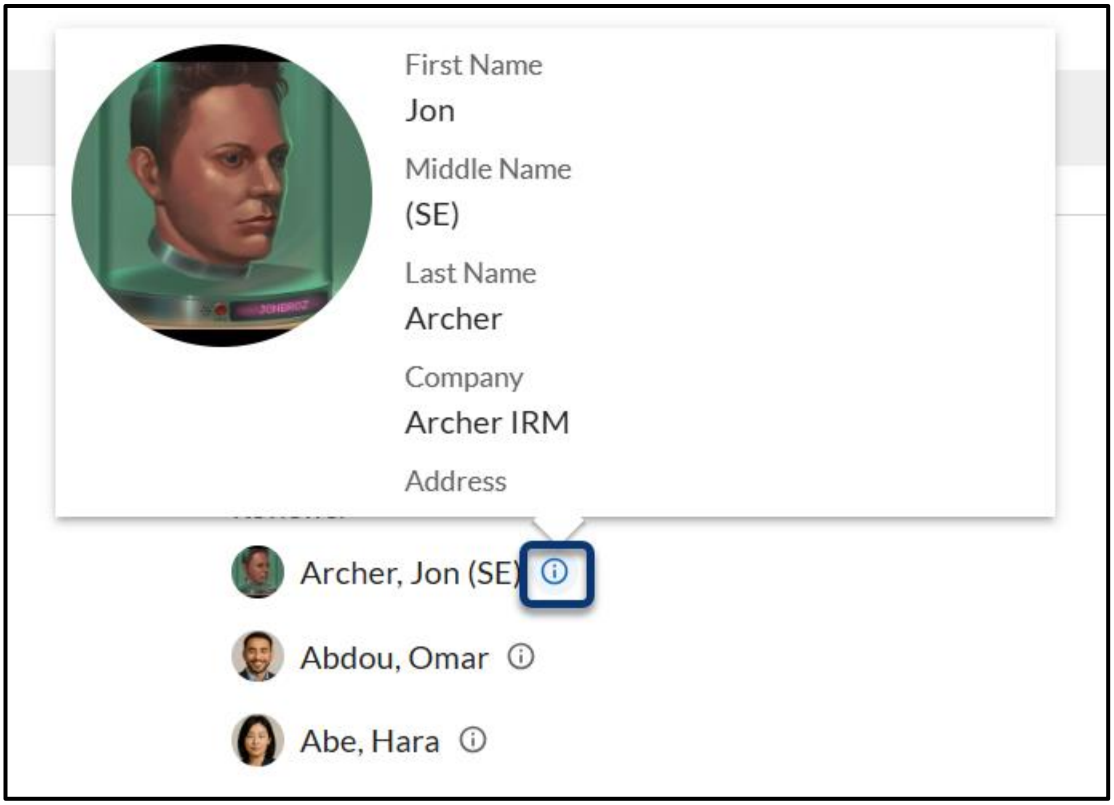
Search your user name by starting to type your user name and select it to add it to the field – you will notice that the list reacts real-time to you searching the name in the field without you needing to scroll to the details.

Once selected, you can click the "Save" button from the floating buttons at the bottom right of the screen.

With Record Permission fields, you will now see the Avatar of the individual if they've added one in their user properties, or initials of their first and last name.



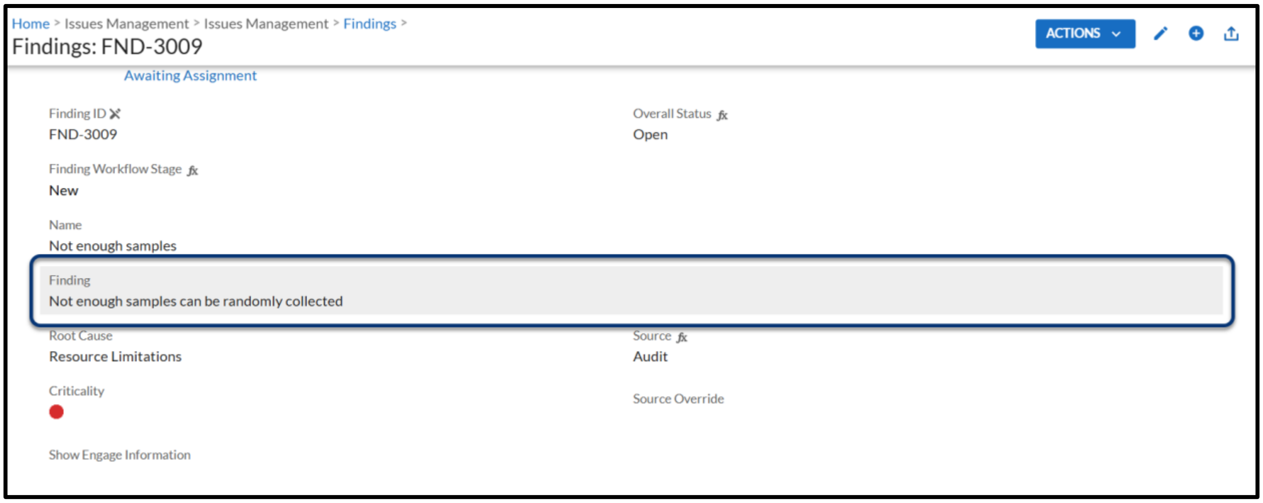
Clicking on the “i” information icon will show more information about that user if available

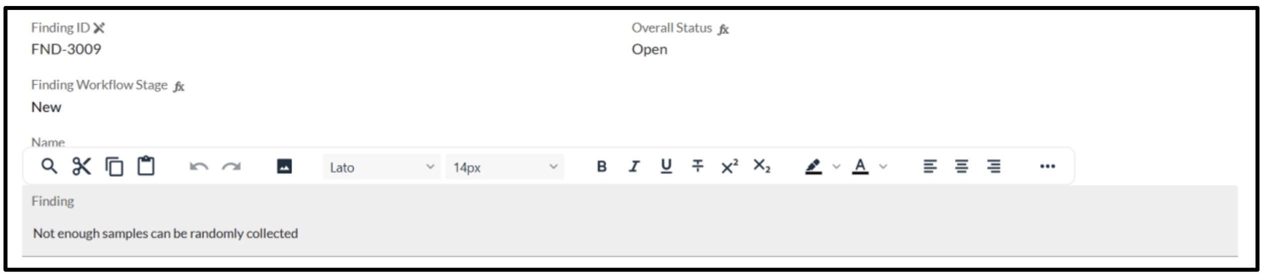


Record Page – Adjusting Field Height

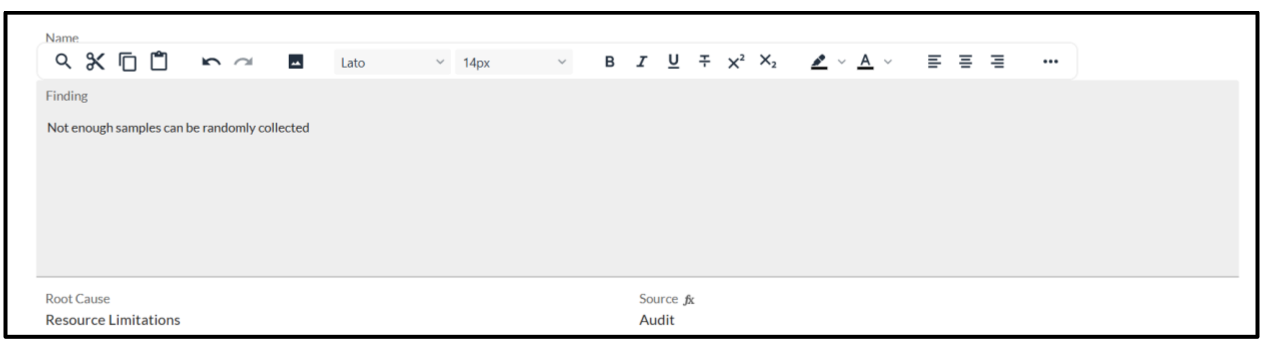
Text Area’s also got a refresh in the NextGen User Experience. Instead of having to “fix” text areas to the number of rows, Text Areas will now auto-adjust based on the content within the field and the number of rows needed, ensuring a clean user experience.

Click “Finding” to open the field into Edit mode.

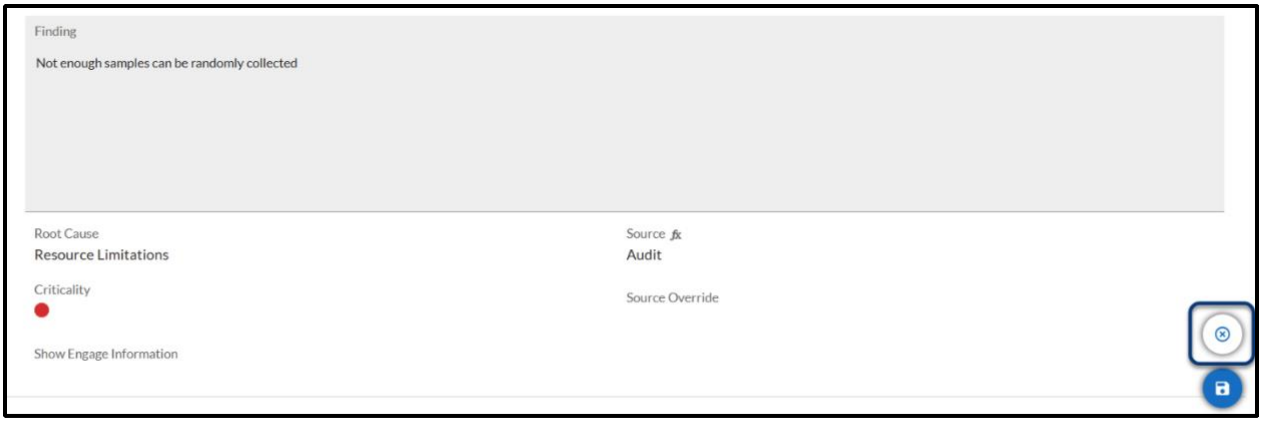




As you add rows in the Text Area you will see that text box start to expand. Go ahead and add a bunch of rows and watch how the text box expands to the number of rows you need to visualize the information within the Text Area.



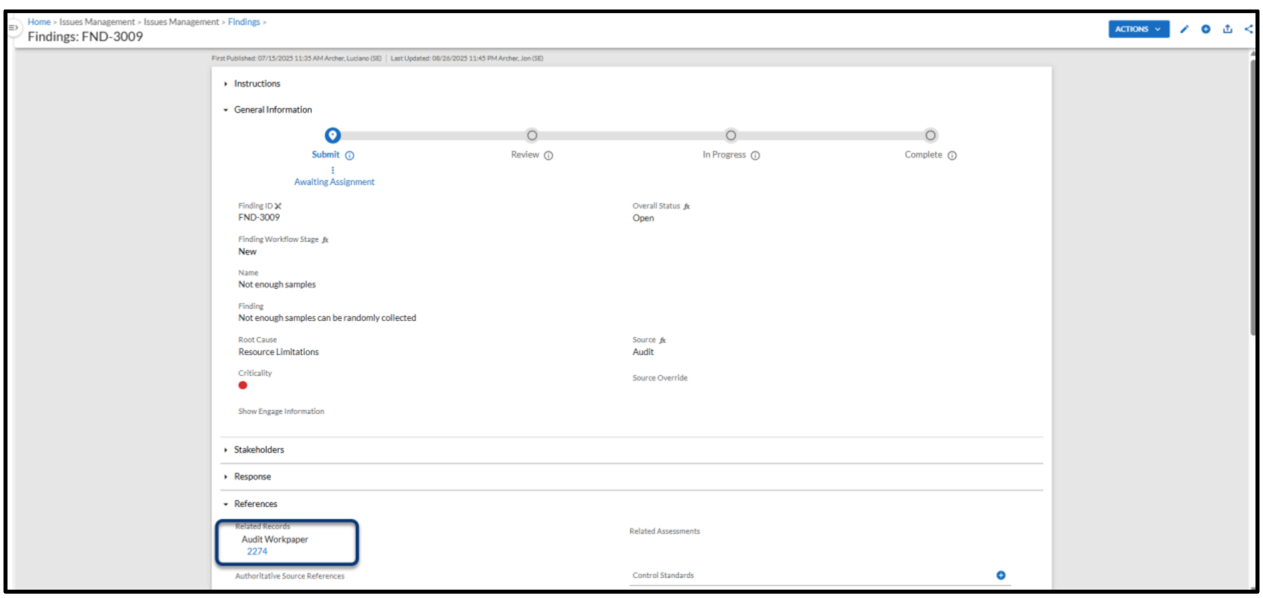
Hit the "Cancel" button to remove the extra rows and put the record back into "View" mode.



Record Page – Breadcrumbs

Another addition to the record page and navigation experience is the Breadcrumbs feature. The breadcrumbs feature will highlight where you've been within the record string, allowing you to seamlessly jump backwards to records you've previously been reviewing.

Click "<Audit Paper Record ID>" under the References section to navigate from the Finding Record to the linked Audit Workpaper.



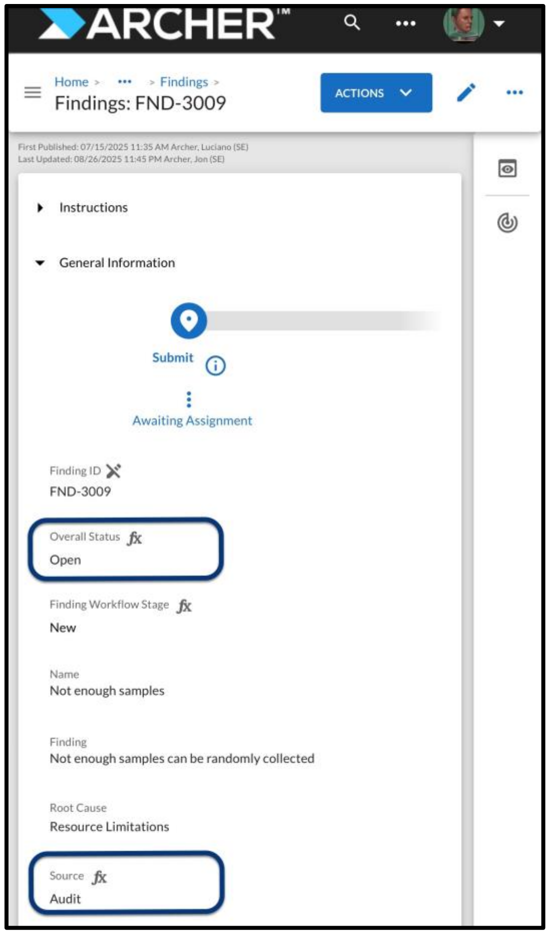
Click into the Workpaper

See how the Breadcrumbs are highlighting the previous records you've been in. You can then easily jump back to the Finding by clicking the "Finding Id: <REF NO>" hyperlink to go back to your finding record.

Record Page – Reactive Layout

Another exciting update is the ability to enable dynamic column layouts. Instead of the classic fixed experience of a 2-column layout, Archer now supports up to 4-column layouts and this is reactive based on the end user screen size. For example, larger devices will see a 4-column layout, versus smaller devices, like a mobile phone, will only see 1-column layouts.

Here is an example of this of the findings record taken from a mobile device where Archer has rendered automatically to a single column when vertical and re-render when horizontal. The fields highlighted have been rendered into the single column where they were a dual column on desktop.



Record Page – Right-hand Panel

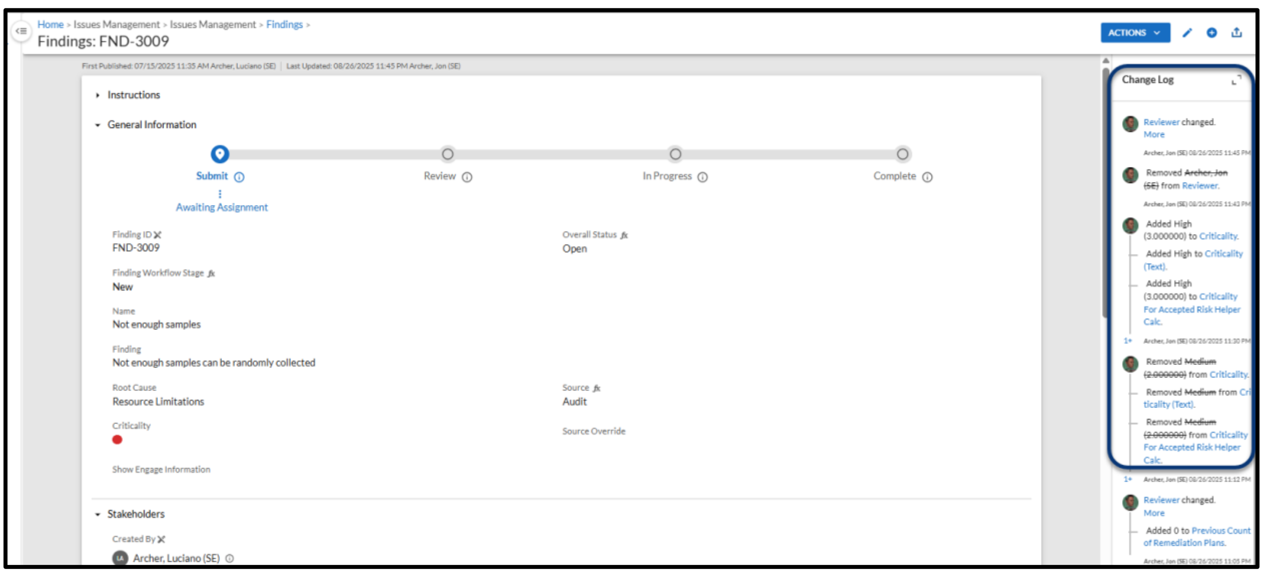
A new concept called the Right Panel has been introduced to streamline the user experience around easily accessing Record Access History, History Logs (including workflow changes) and Content Errors. Where a History Log and Access History field exist on the record, you will see those buttons on the right-hand side upon opening the record within the Application. If neither of these exist, you will only see the right-hand panel when an error occurs.

Let's look at each of these options

1. **Change History**

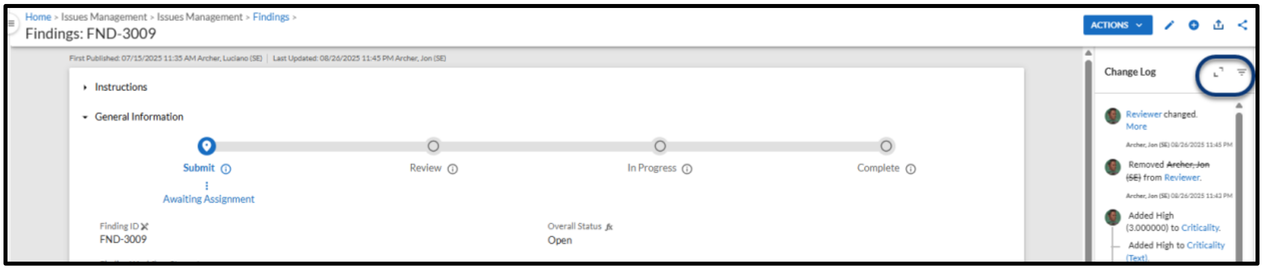
Hovering over the button will tell you what field it is. Click on the Change Log button to see the History Log details

The right-hand panel will now pop out to show you all changes that have been made, by which user and to what field and when

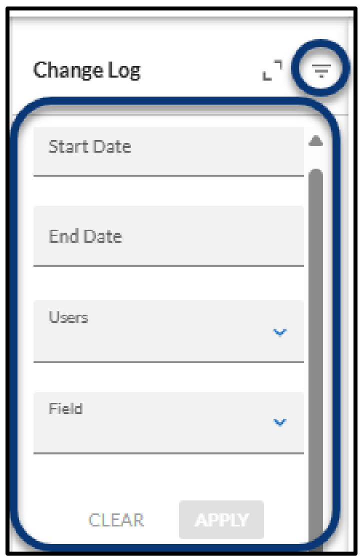


You will notice that the Field Name is a hyperlink. Click on the hyperlink to be brought to the field on the layout.

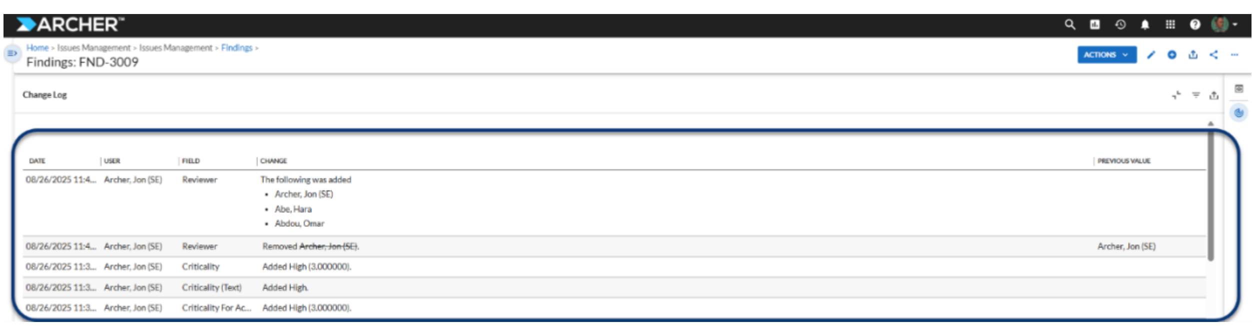
Note that you can also Filter and Expand this view as necessary with the Filter or Expand buttons



Filtering will allow you to filter on Date, User or Field

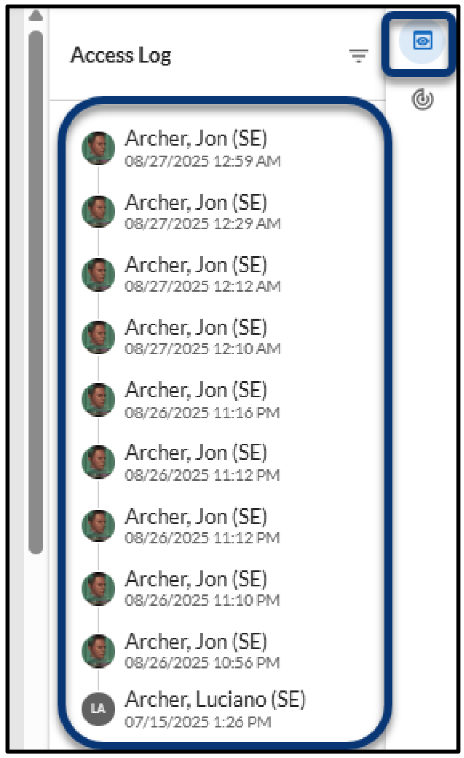


Expanding will show you more information as it relates to the changes listed



2. Access Log

Click on the Access Log button to now see a listing of all users who have Accessed this record

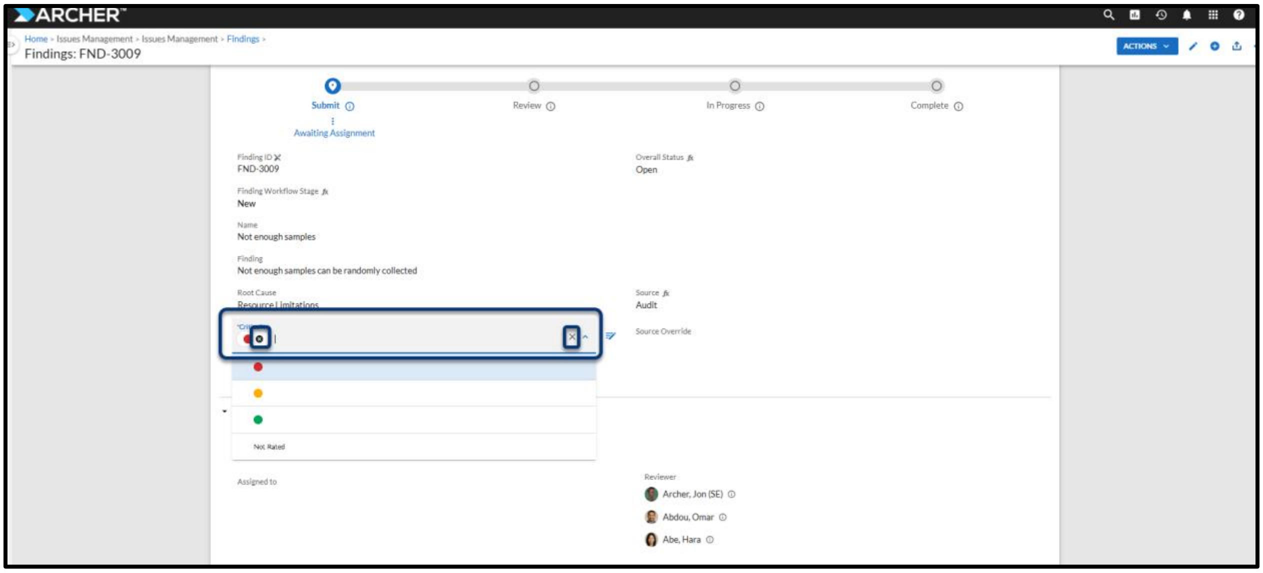


Access Logs can also be filtered.

3. Errors

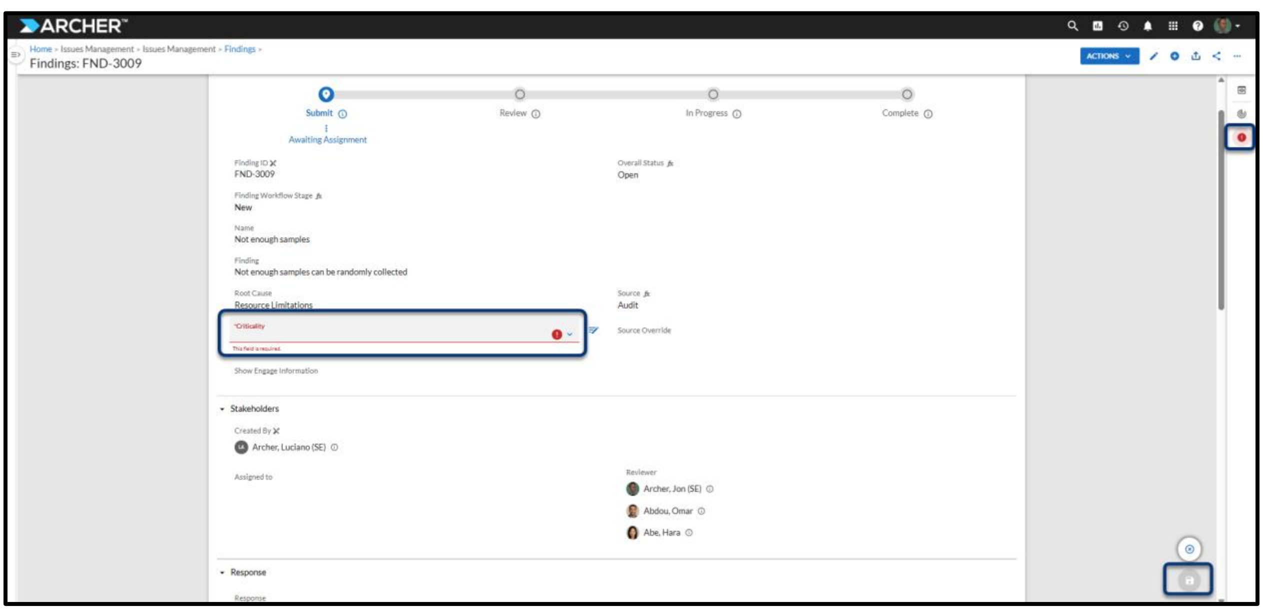
When a required field is not populated, the Errors icon will show up on the right-hand panel. This tells the user that there is something that requires attention within the record.

Click on the “Location” field to put it into Edit. Clear the field by removing The “High Criticality” by clicking the “x” to the right of the entry.

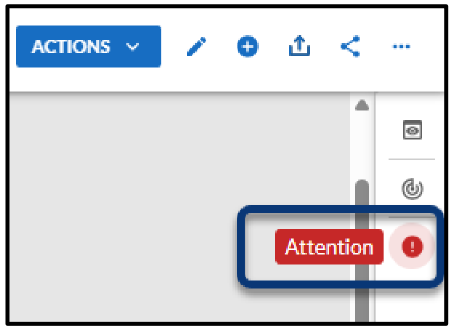


Immediately after removing the contents of the field, you will see the Error button highlight in red on the right-hand panel as well as the field turn Red with the warning indicator highlighted at the field level.

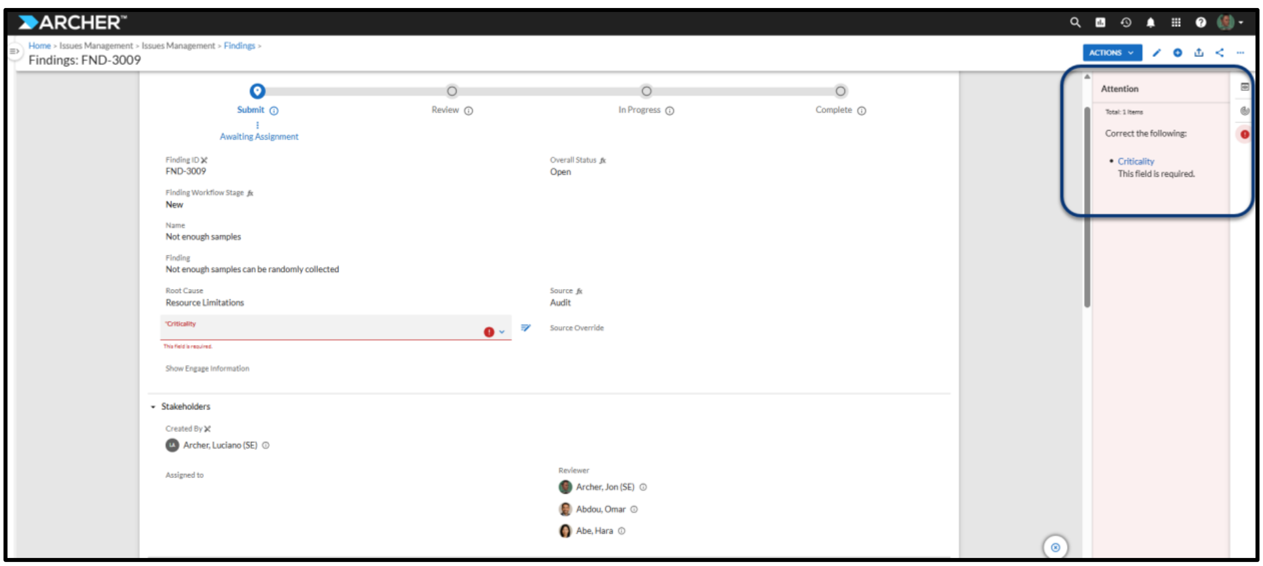
You will also note that the "Save" floating button is now greyed out.



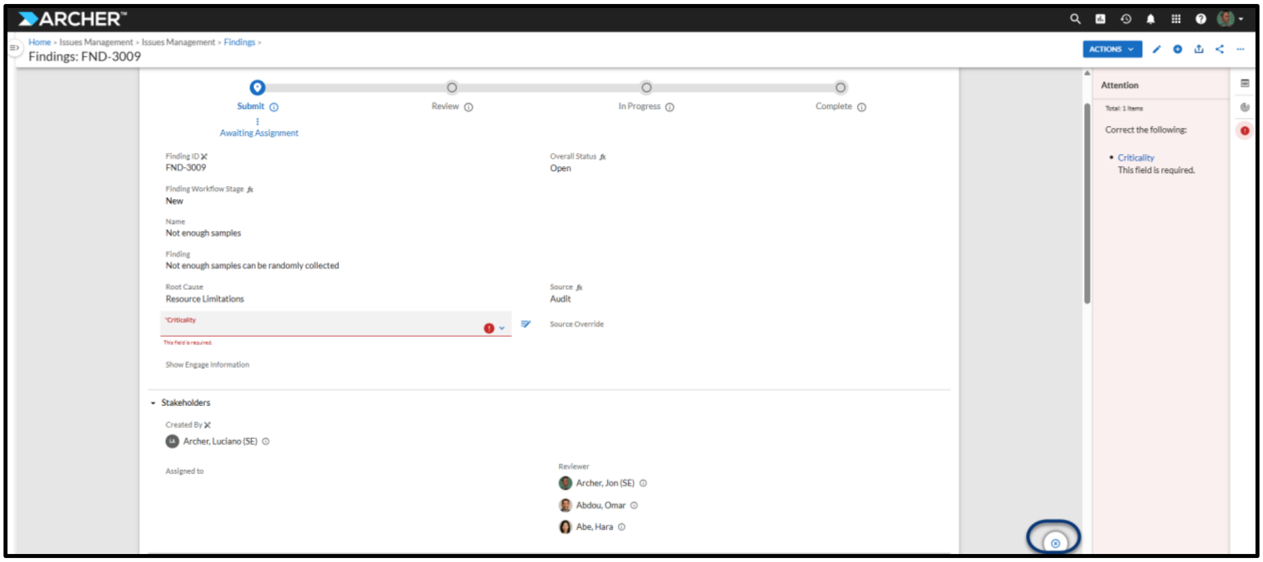
Click on the Attention/Error button to view the Errors on the page



You will now see more information about what's required. Not only will the field in error be hyperlinked (so you can click on the hyperlink and be directed to the specific spot within the record that the field is) but it will also group them by Section for ease of navigation



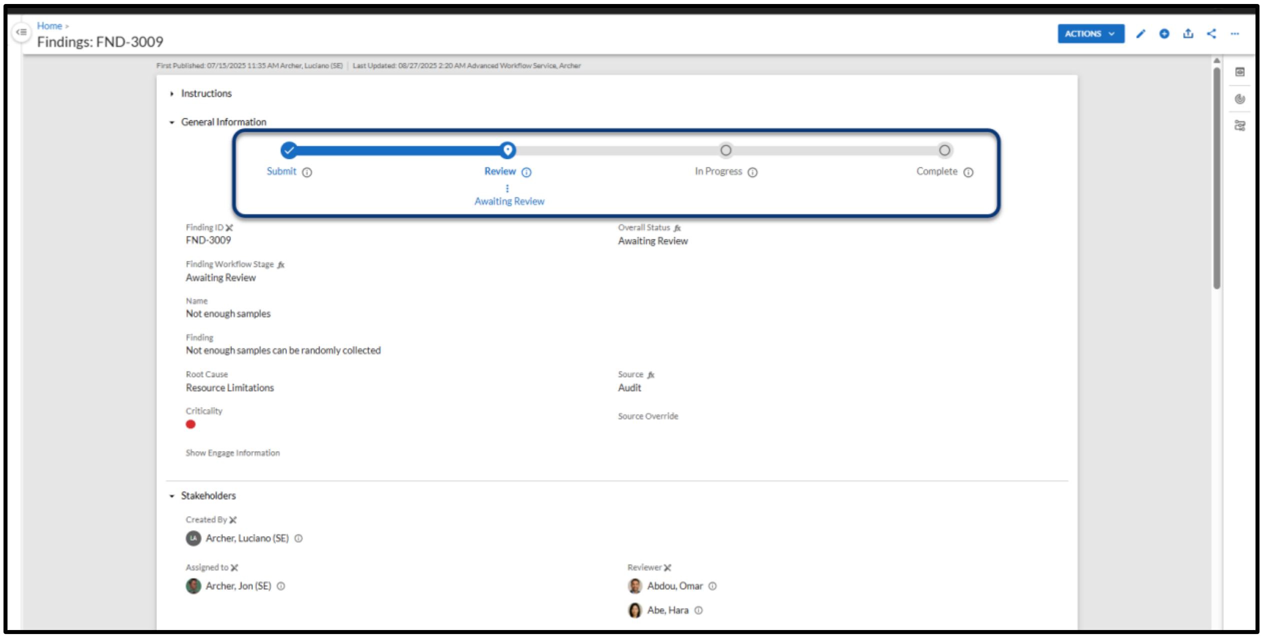
Click the Discard button to discard your edit and go back to View mode



<u>Record Page – Progress Tracker</u>

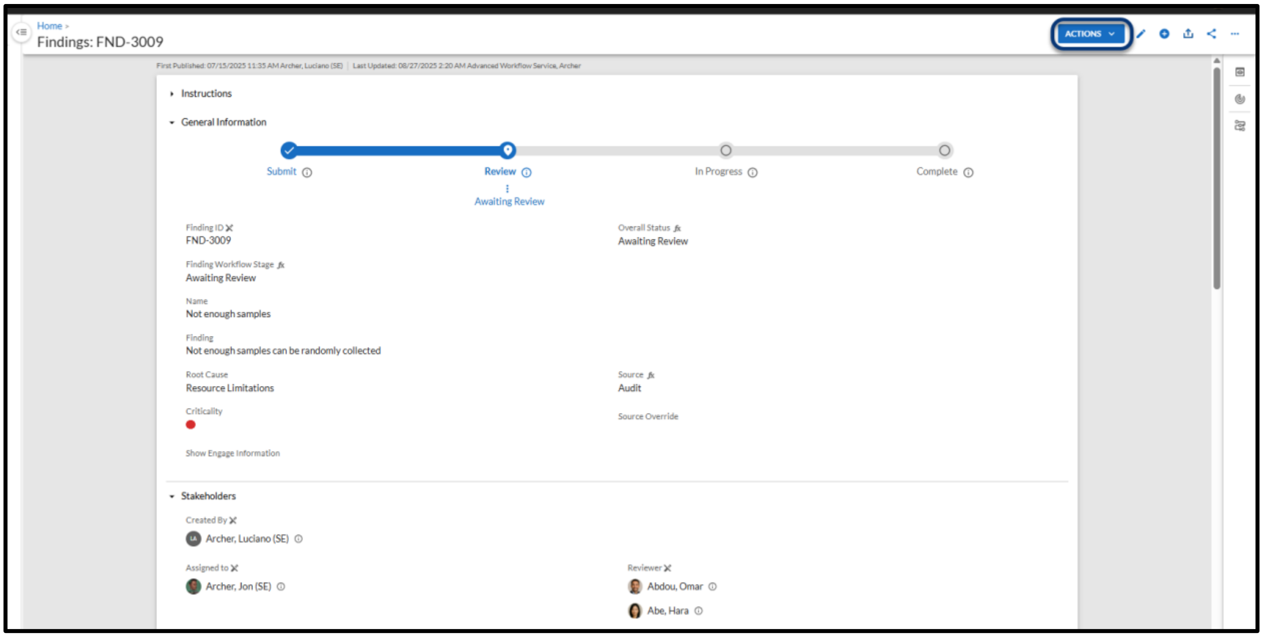
Another big ask from our clients, and one we have previously solved with a Custom Object, is the progress tracker. The Progress Tracker is a visual queue as to where you are in the workflow progress and can be linked to any values list field.

In this findings record, the Progress tracker is reflecting the Overall Status field on the record header.



<u>**Record Page – Workflow Actions Updates**</u>

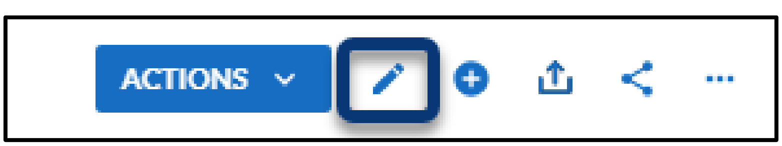
Moving away from the Actions Button, we are now putting the workflow buttons at the top of the screen. Workflow buttons will now be available from Edit OR View formats, removing the need for the user to click “Edit” to open the Actions options in the record, and removing the need to click on the “Actions” drop down button to see the available workflow options

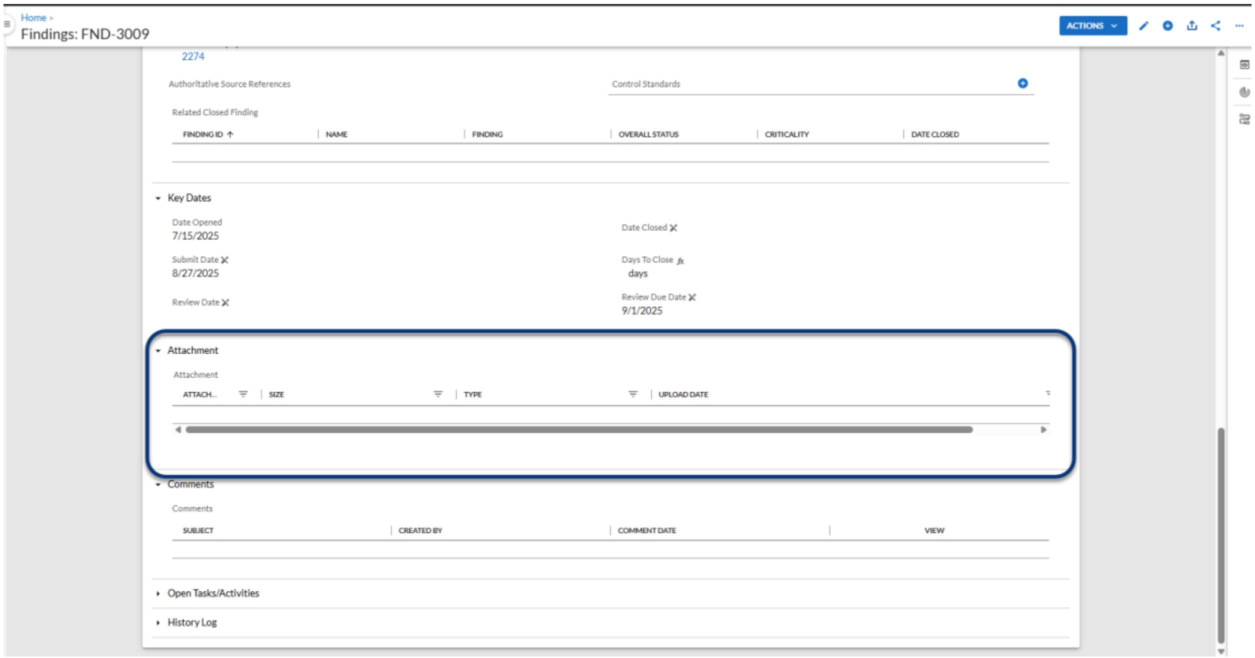


Workflow changes are also now tracked in a new Action button called Record Progress which can also be found on the right-hand panel.

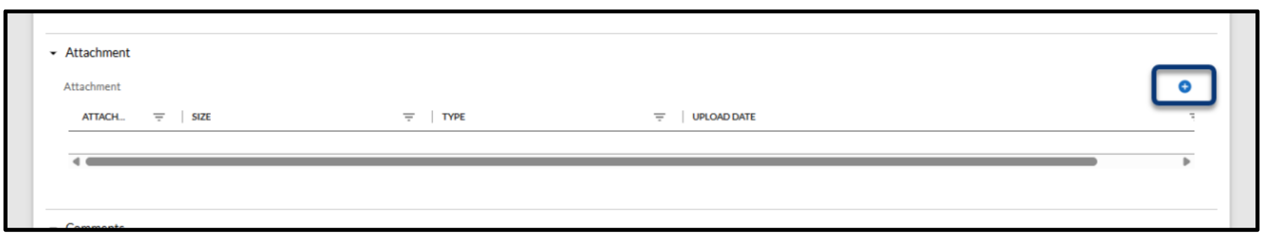
Record Page – Bulk Download Attachments

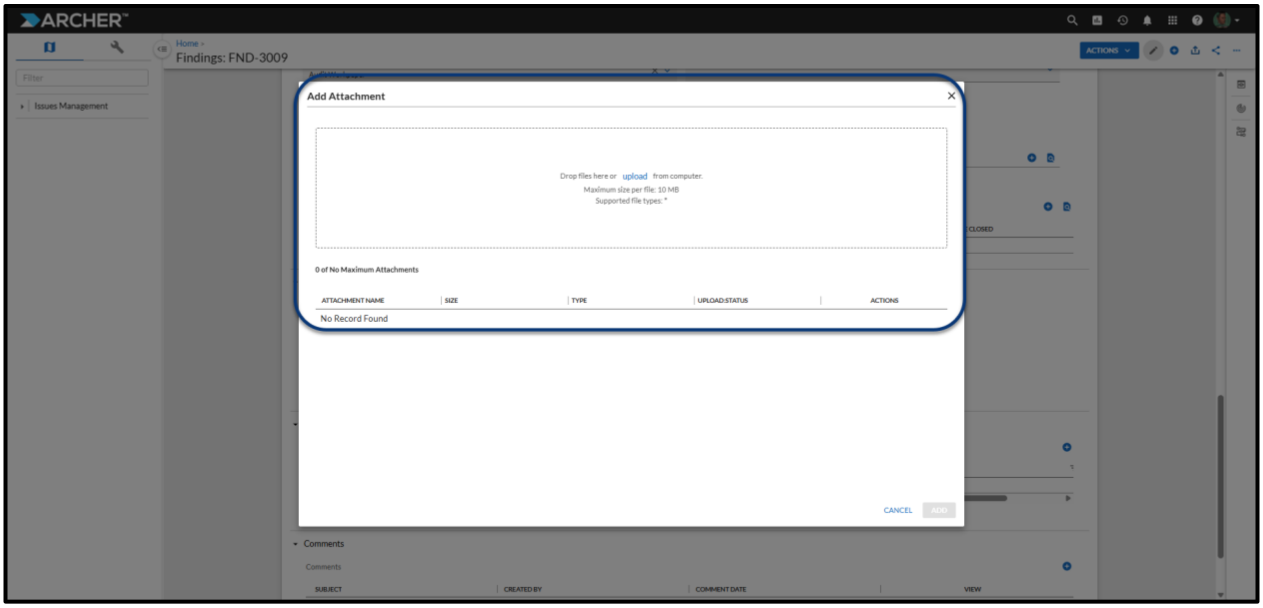
The Attachment field also got an update. Click the Pencil icon to put the whole record into Edit mode and scroll down on the page to the Attachments field.



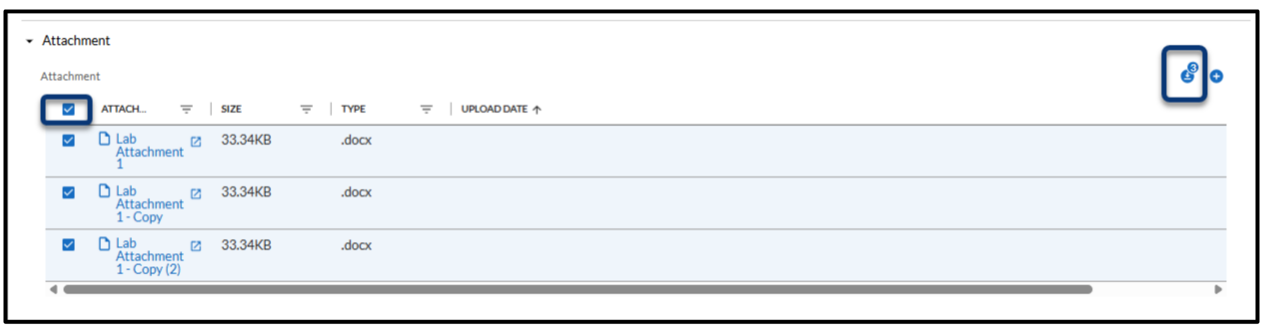


Click on the “+” sign to add a couple attachments to the field. Note you can now drag/drop attachments into the lookup.





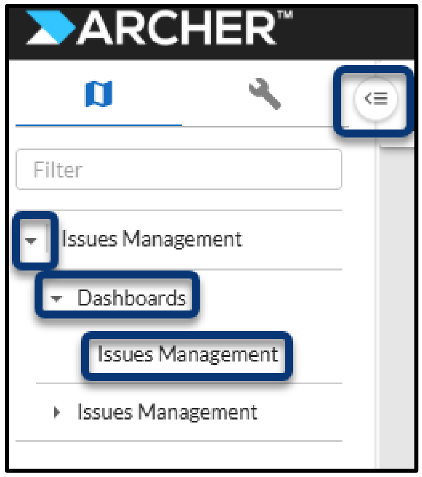
With the NextGen Risk Experience, you now have the ability to bulk download all attachments in the attachment field, or download one by one



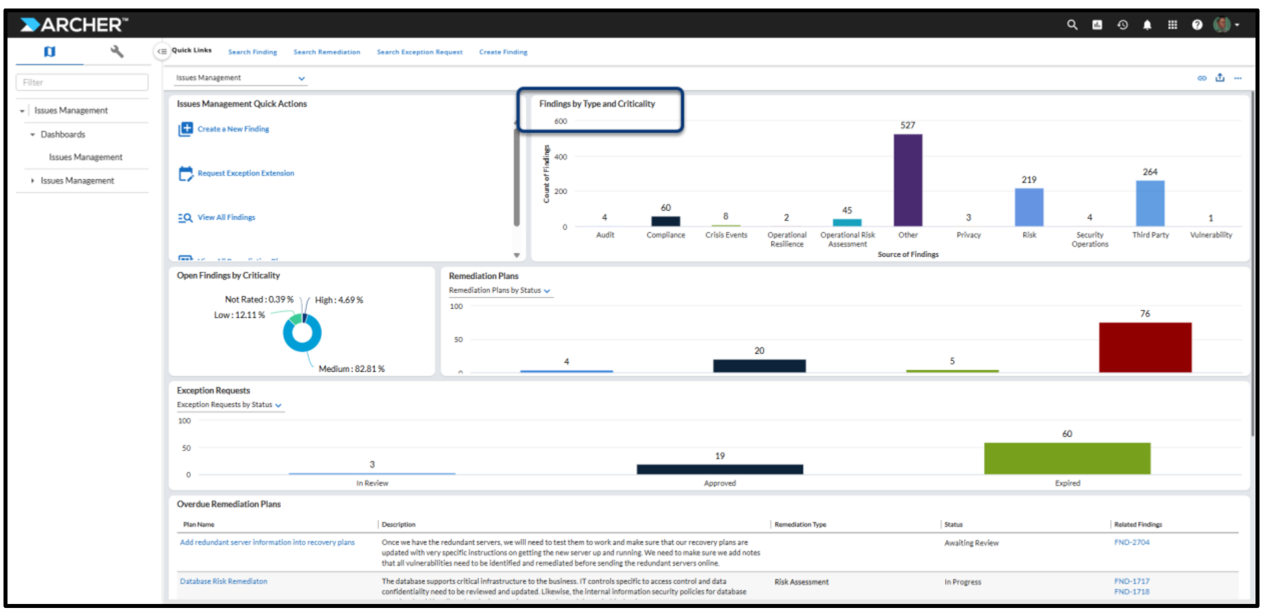
Reporting – 3 Panel Layout

Lets go back to the Issues Management Dashboard.

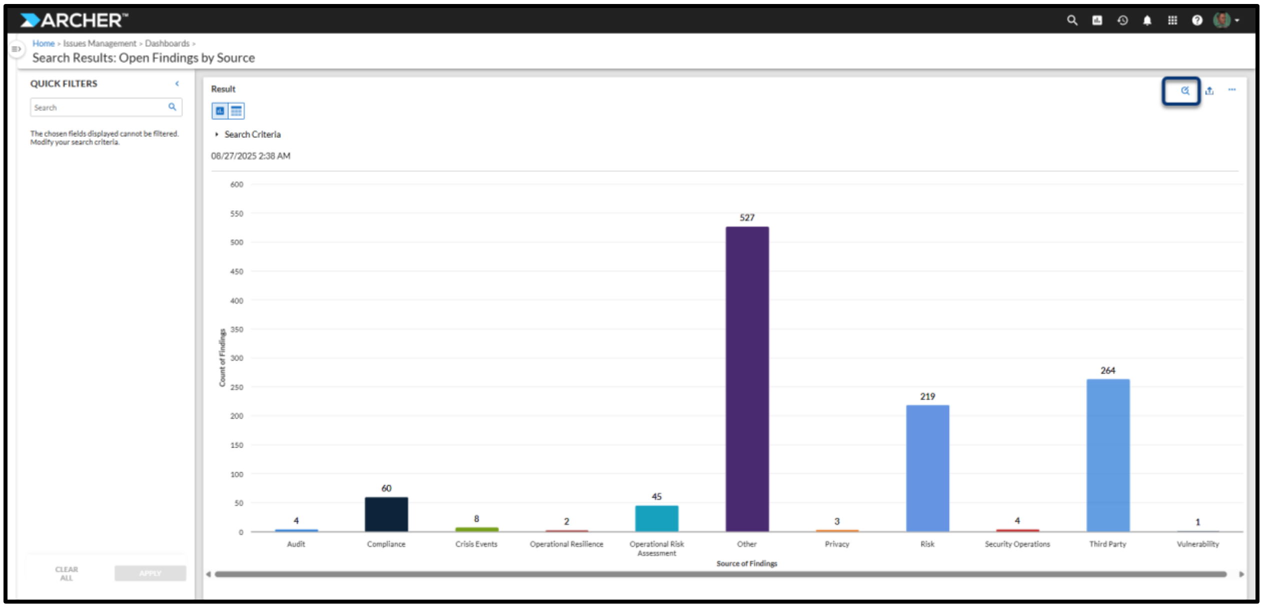
Open the left-hand Navigation menu and Open the Dashboards section and click on the Issues Management Dashboard



On the Dashboard click on the Widget name “Findings by Type and Criticality” to open the Report in a full screen mode

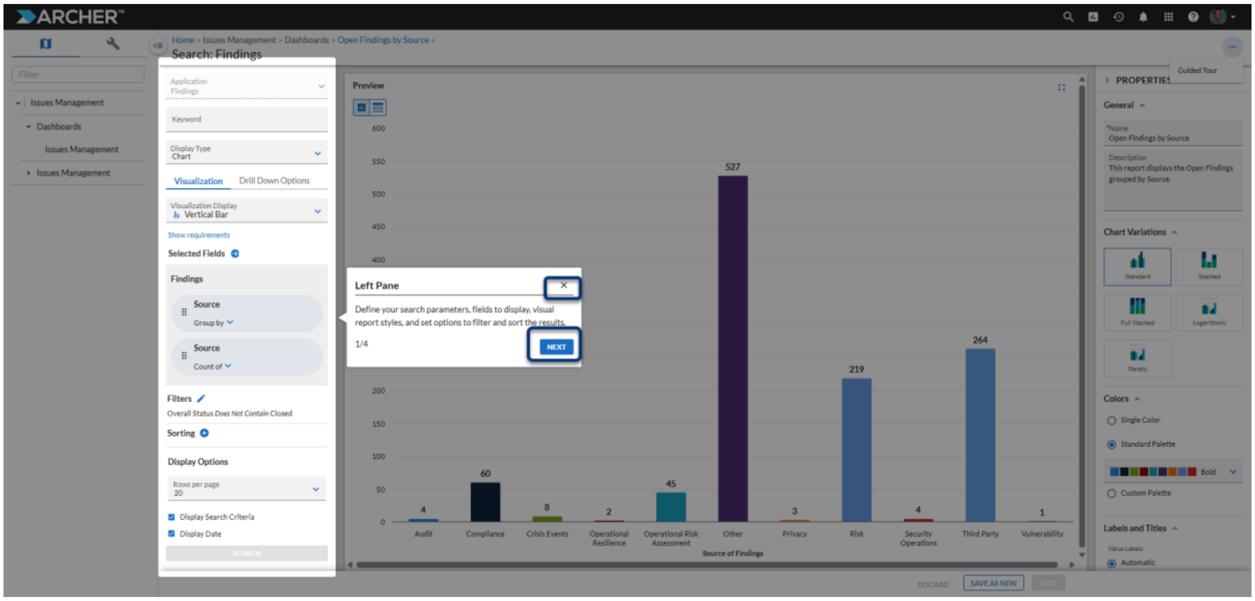


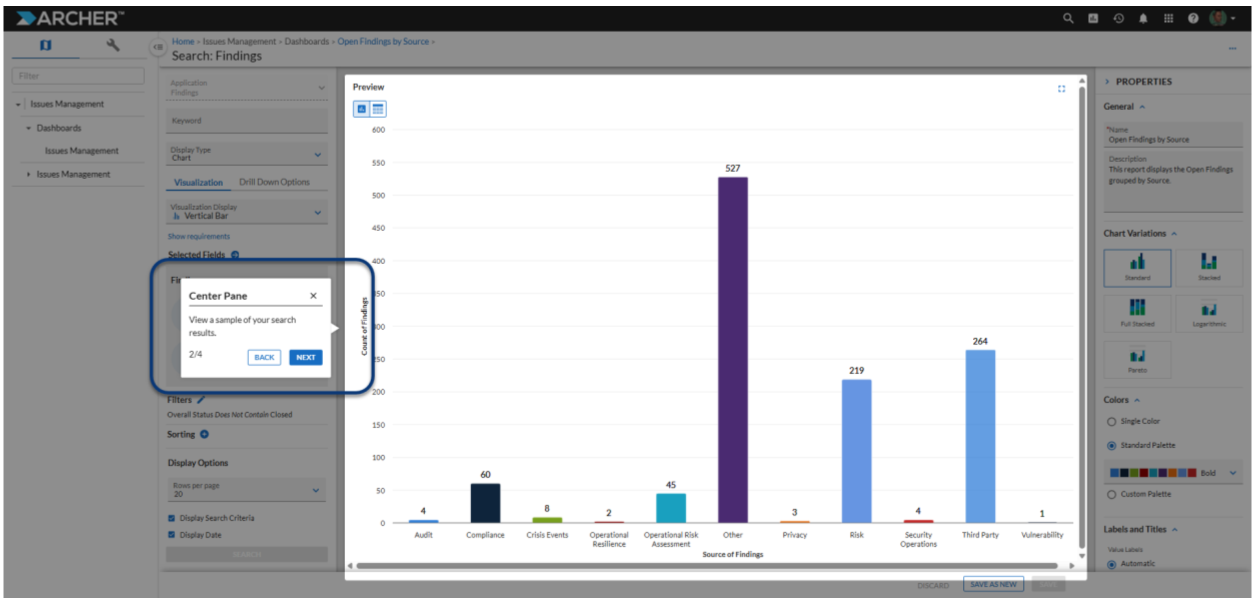
Once on the Report screen, click “Edit Search” to open up the new Report builder.

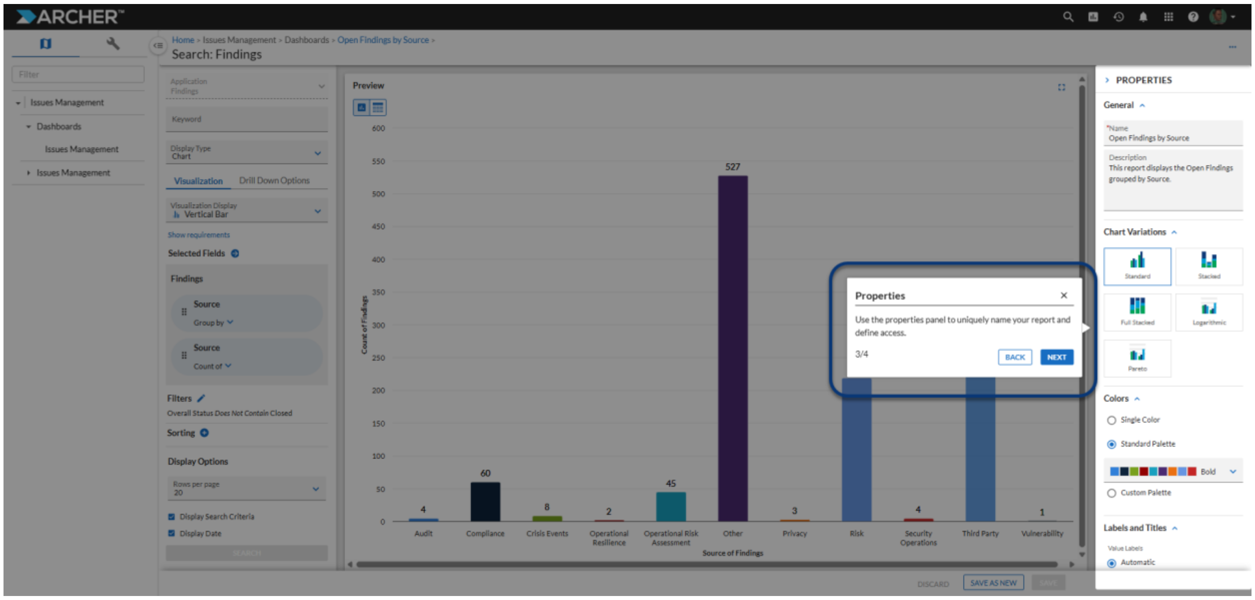


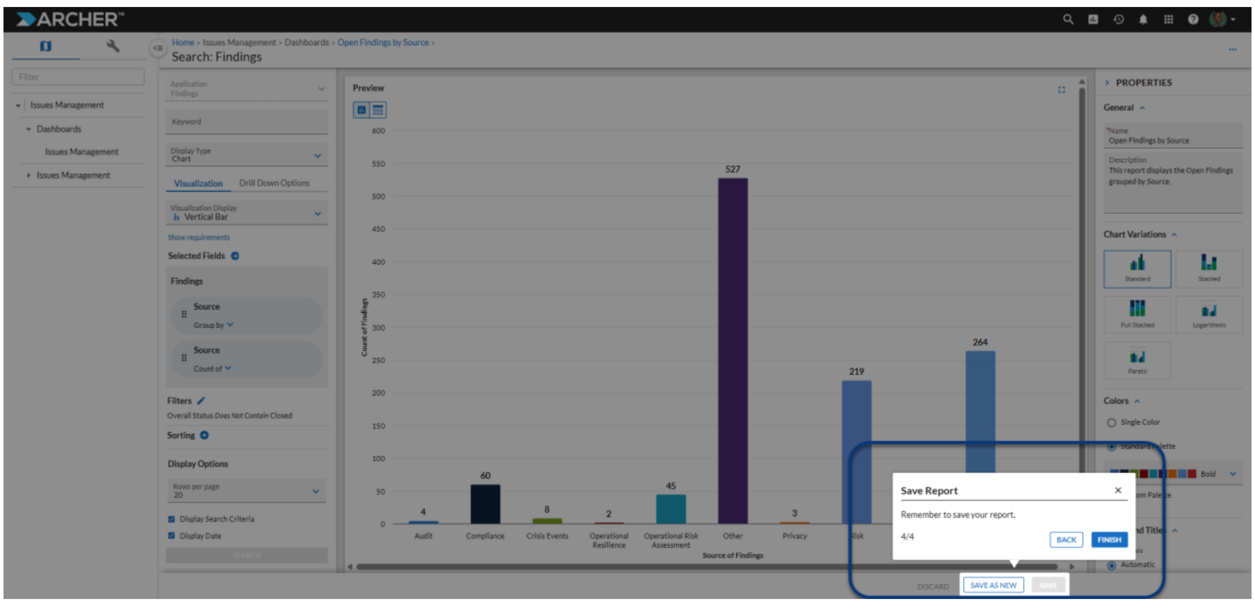
Notice that you will be brought through a new Guided Tour to help you navigate the newly enhanced Reporting builder in the NextGen User Experience. If you are not you have the option to click on the Ellipsis and play the guided tour.

Click “Next” through all 4 screens, or click the “x” to end the Guided Tour.

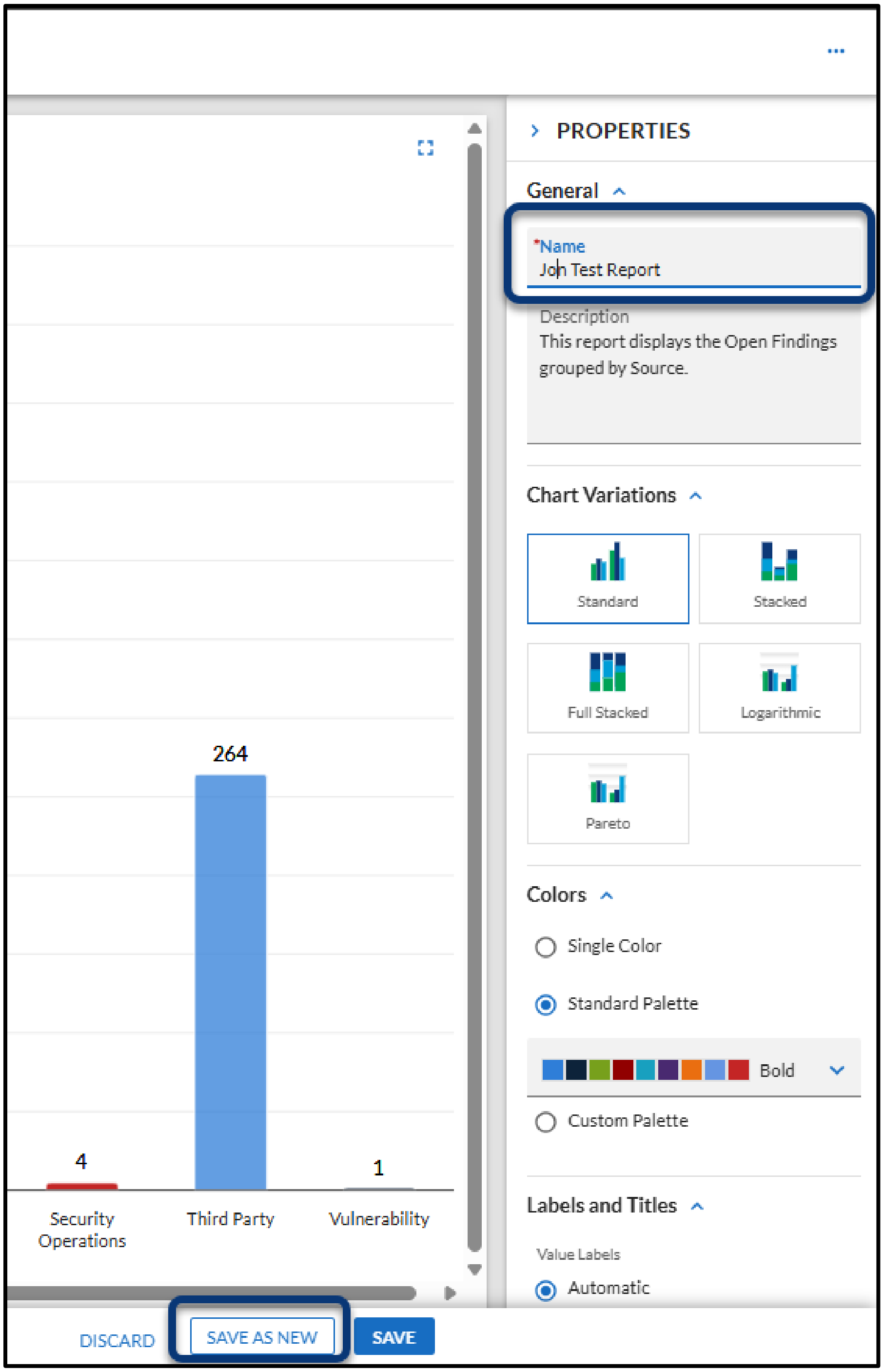

Left Pane
Define your search parameters, fields to display, visual report styles, and set options to filter and sort the results.
1/4
NEXT


Center Pane
View a sample of your search results.
2/4
BACK
NEXT





Give the Report a New Name in the Name section in the Properties panel and save it (you can save it as personal, shared or global)

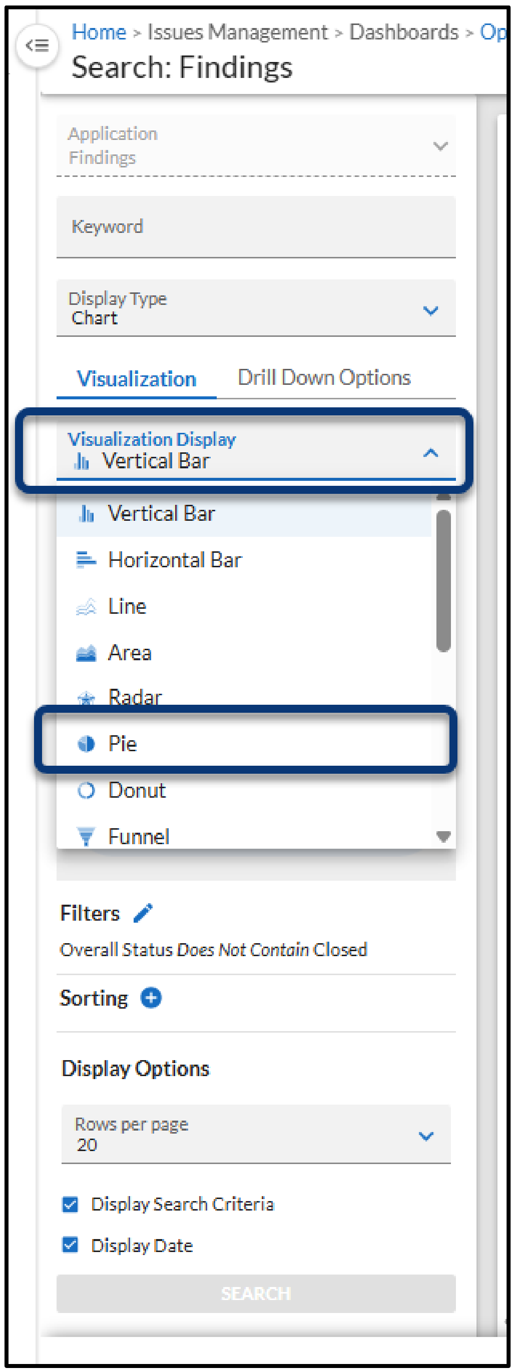


On the Left-hand panel, you can start to modify the report. The report will already have starting poinst as per the Baseline report we have built off and its source application (Findings)

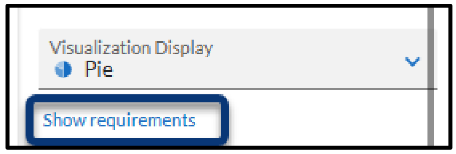
You can hit “Search” to execute a basic table search that will bring back all the related records with your search term

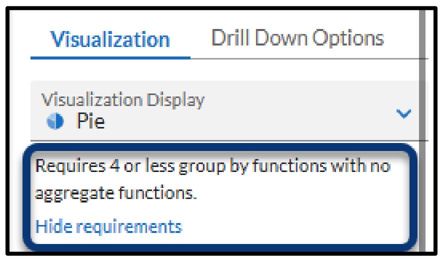
The Display Type will allow you to select which type of report you’d like to create.

For all statistical visualisations such as pie, bar, etc. require “Chart” (Pre-selected). Select “Pie” from the Visualization display drop down list

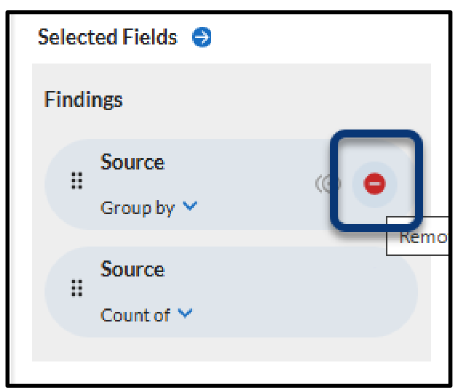


We are selecting Pie for the purpose of the lab, but you're also welcome to play around with other options. You will note a "Show Requirements" hyperlink now display under the visualization type. This will help you identify how many fields you can evaluate to create the chart output

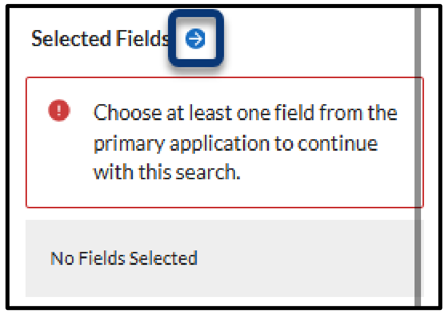




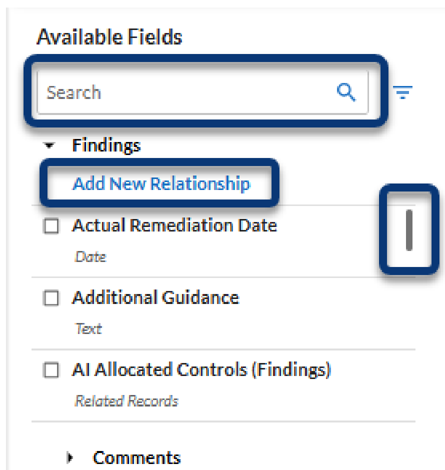
To remove the existing selected Fields scroll over the current options and select the remove icon for each Field.



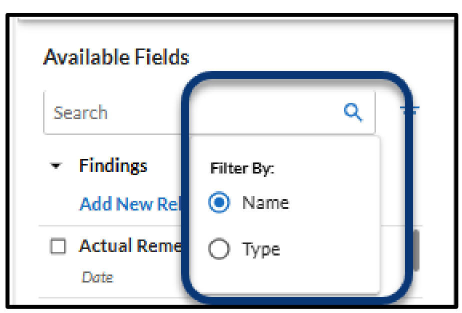
You will then be asked to select fields to evaluate by clicking the blue arrow beside "Selected Fields"- This will show all fields within the application that are reportable.



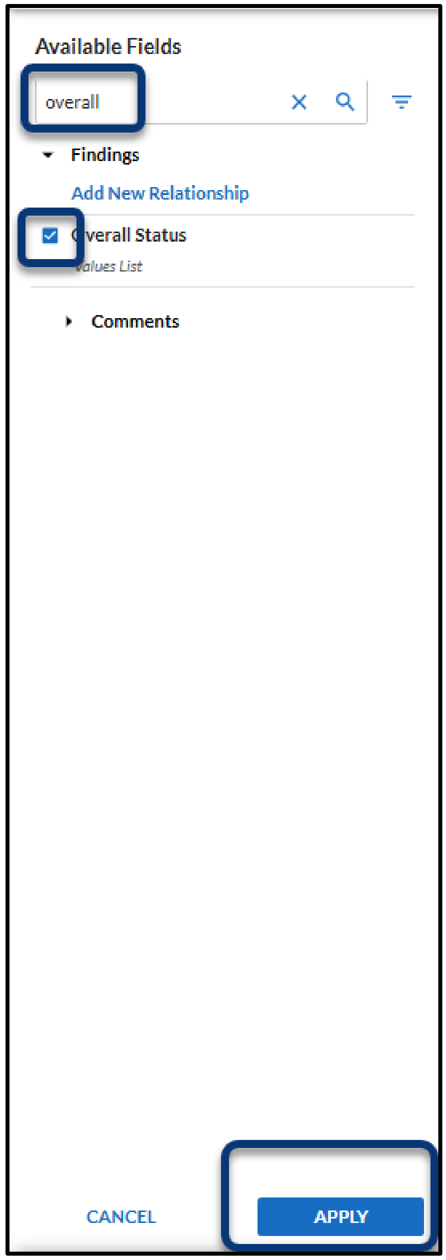
You can search fields within the Search bar and Archer will refine the list real-time. New relationships can also be added by clicking the blue "Add New Relationship" hyperlink. The Available fields are scrollable for you to alternatively look through and select.



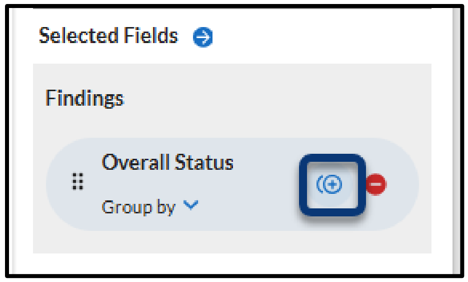
Users can also now filter on the Field Name or the Field Type



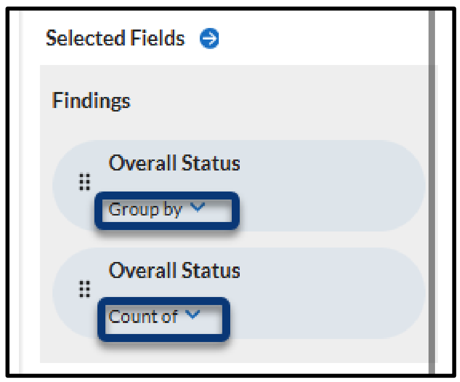
In this scenario, search "Overall Status" and click "Apply"



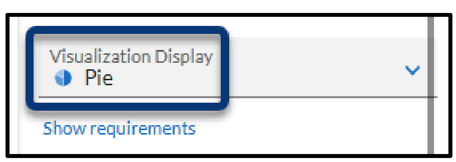
In this report we are going to create a Pie chart that looks at the number of Findings by Overall Status, so once we get back to the Report Builder, we will "duplicate" that field by hovering over the field and clicking the "+" bubble.



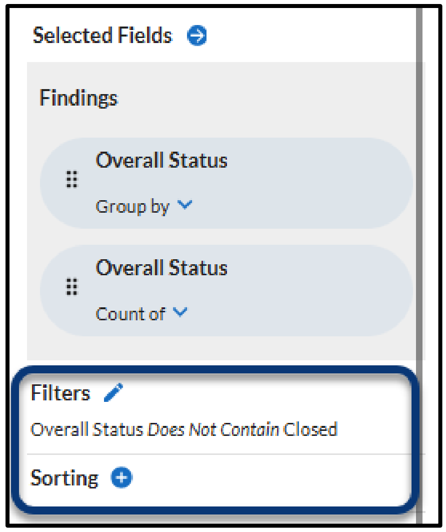
You will now see a Group By and a Count of line item for Overall Status. You can change these by clicking the down arrow if needed



If you look back to your visualization Display bar, you will see that due to you removing all existing selecting fields and then adding new ones back in the Visualization Display "blanked" then changed to Visualization "Vertical Bar". This is due to Archer recognizing it cannot create a chart on nothing (it blanking) and then pre-selecting the first chart option available once the fields were selected. Change this back to "Pie".



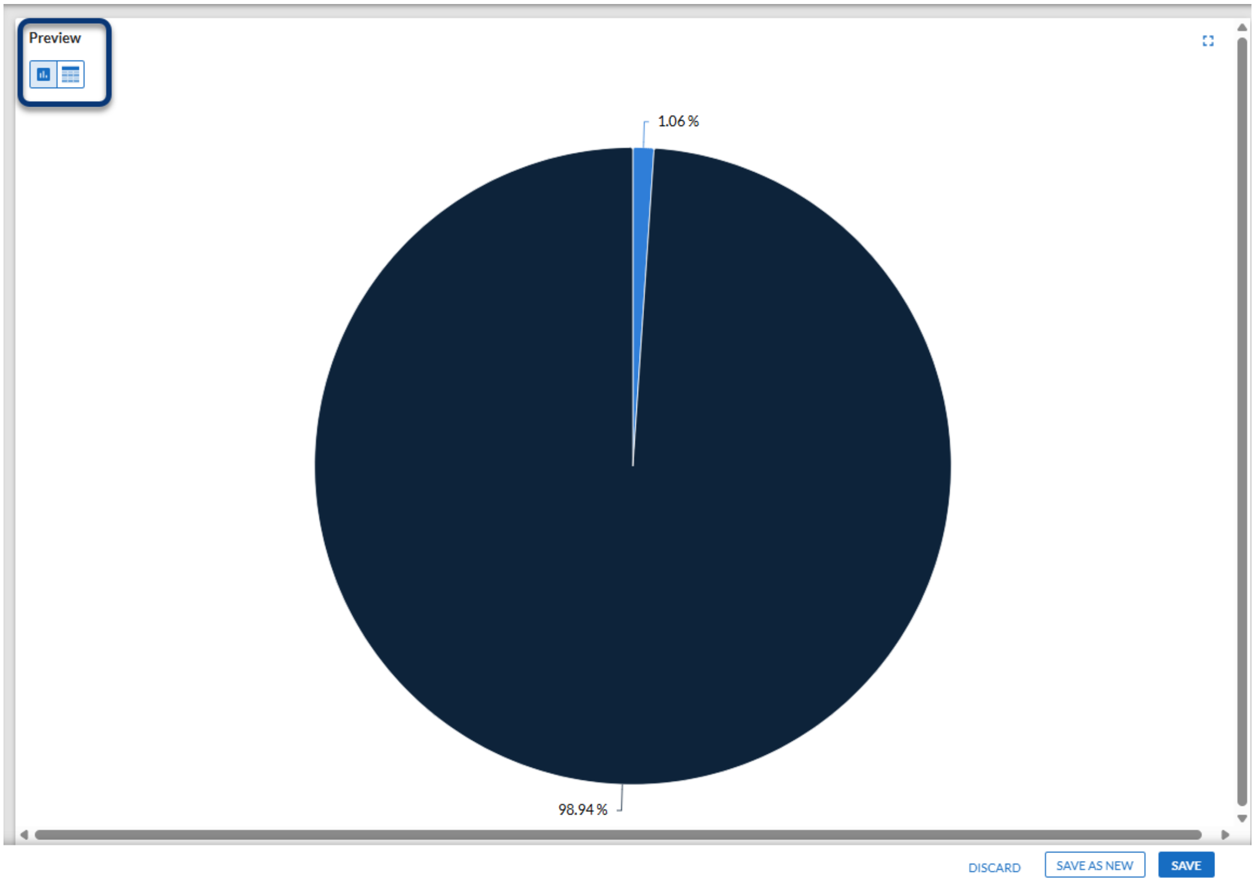
Additional filters can be added in the "Filters" section, and sorting properties can be defined in the Sorting sections



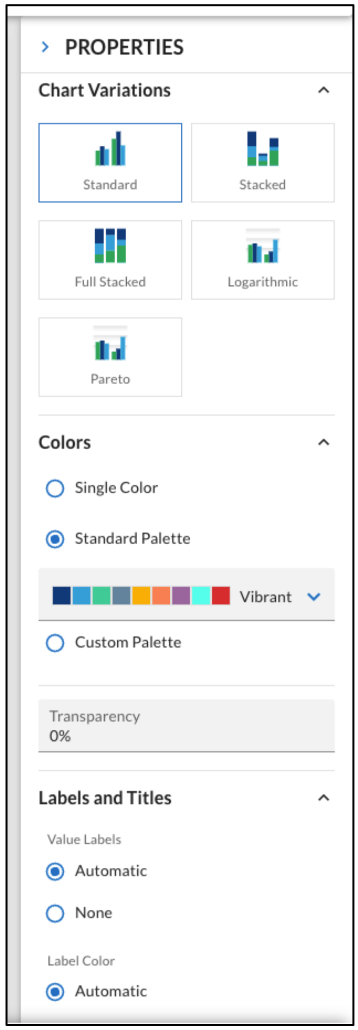
For the purpose of the lab, we have a prepopulated example, “Overall Status Does Not Contain Closed” Feel free to remove, change or add your own.

When you’re ready, hit “Search”

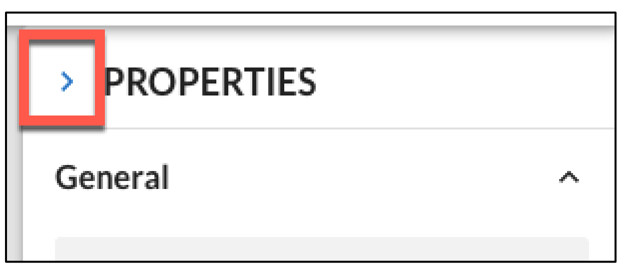
Notice how the Report builds in the centre pane so you can see exactly what you’ve created without leave the edit screen. You can switch this from the bar chart to data by clicking on the “Table” or “Chart” icons on the top left of the report



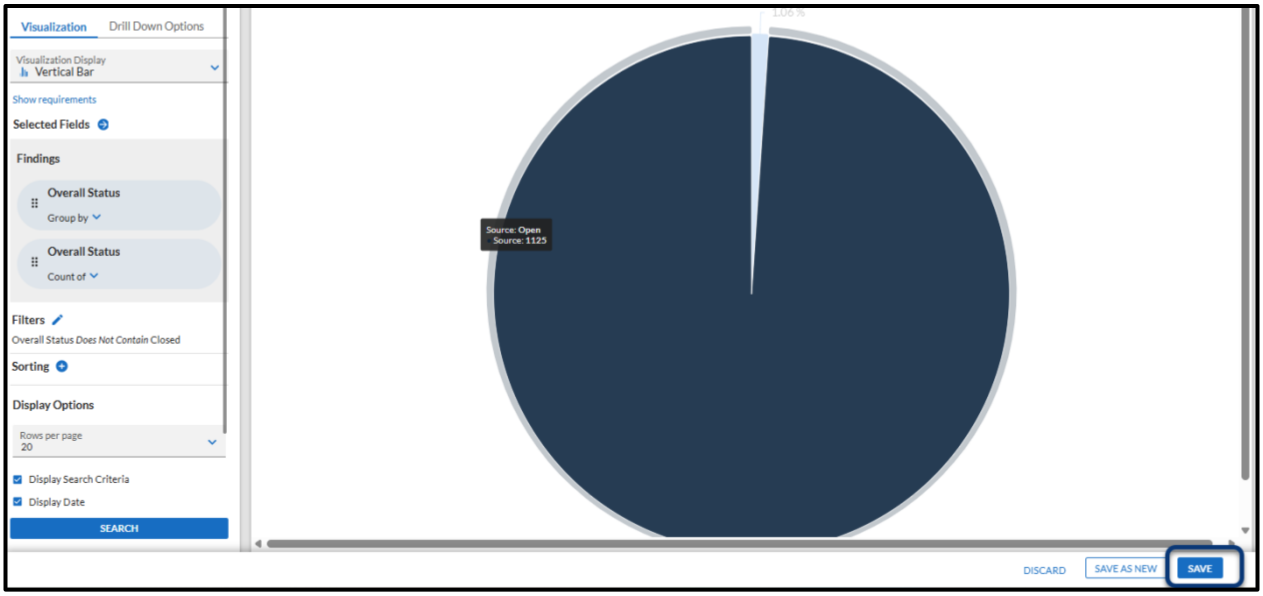
The Chart properties are on the right hand panel where you can adjust things like the Chart Variation, the Colour Palette, Labels and Titles, Axis Names, Legend Placement and Report Access. Feel free to play around with the properties as you'd like.



The Properties panel is collapsable to make the report larger on the screen if desired



Once you're ready, click "Save" at the bottom of the screen to save your change


Visualization
Drill Down Options
Visualization Display
Vertical Bar
Show requirements
Selected Fields
Findings
Overall Status
Group by
Overall Status
Count of
Filters
Overall Status Does Not Contain Closed
Sorting
Display Options
Rows per page
20
Display Search Criteria
Display Date
SEARCH
Source: Open
Source: 1125
DISCARD
SAVE AS NEW
SAVE