INTEGRATED RISK MANAGEMENT

Service brief

ARCHER® PLATFORM UPGRADE

Project overview

As your company IRM/GRC programs mature and the demands on the Archer platform increase in both complexity and activity, it is important to ensure that the configured solutions are updated and tuned on a consistent basis. Karta's Archer Platform Upgrade Service will position your Archer solutions to include the latest improvements in functionality and performance.

Before upgrading to a new version of Archer software, there is a need to ensure your environment's infrastructure meets the baseline requirements and can capitalize on Archer's latest technology features and enhancements. As part of Karta's Archer Platform Upgrade Service, we assess the readiness of your environment and deliver best-practice recommendations to optimize your operational experience. This is a must-have prerequisite to a successful deployment.

This service provides a software upgrade of your licensed on-premises Archer solution environment. A custom quotation will be provided and influenced by the number of unique Archer environments to be included.

Project scope

Karta's professional services team will work closely with your key stakeholders to deliver the Archer platform upgrade(s). The scope of tasks will include the following:

KICK-OFF MEETING WITH YOUR KEY STAKEHOLDERS AND REPRESENTATIVES TO:

- Introduce key Karta technical resource(s) and outline clear channels of communication.
- Identify key subject matter experts and decision makers to participate in platform upgrades.
- Provide an overview of the upgrade process.
- Review upgrade and stakeholder requirements.
- Create a project timeline and plan for the upgrades.

ANALYZING AND PLANNING:

- Assessment of the readiness of your Archer environment for upgrade. Karta will provide documentation to determine the preparedness of your Archer environment(s) state.
- Overview of your architectural environment sizing. Karta will provide recommendations for environment(s) and self-administered host machine sizing for upgrade compatibility.
- Evaluation of components that can be affected by the platform upgrade(s). Karta will perform a gap analysis between current and final state and deliver a gap analysis assessment identifying any pre-upgrade or post-update actions.
- Planning and documentation of a path to platform upgrade(s).
- Identification of risks associated with the upgrade(s); any steps required for recovery and develop a back out/rollback plan in conjunction with the business teams.

UPGRADING THE ARCHER ENVIRONMENTS

- Assisting with any pre deployment activities. i.e. back ups, maintenance windows, required components downloaded, etc.
- Working with your teams to perform and deliver the upgrade(s). Karta will work with your stakeholders and representative teams at delivering the upgrades as it relates to your standard business practices.

TESTING AND VALIDATING UPGRADE PROCESS

- Karta will perform scripted testing to validate the upgrade process. This will include the Archer services, advanced workflow, user logins and agreed-upon gap analysis of Archer components.

PROJECT CLOSURE

- Karta will provide a knowledge transfer session, where a final state document will be provided to the customer.
- Project closure sign-off.

Deliverables

Karta will provide the following deliverables for this engagement:

- Karta technical consultant (1) to perform the platform upgrades.
- Karta project manager (1) to facilitate clear communication and establish plans and schedules.
- Environment gap analysis assessment with pre-upgrade and post-upgrade recommendations.
- Final-state document.

Customer responsibilities

The customer will provide the following deliverables for this engagement:

- Review and approve engagement objectives.
- Provide technical contact(s) with required access to the engaged environments.
- Ensure that required prerequisites are completed prior to environment upgrades.
- Facilitate and make available any system maintenance windows required for the engagement.
- Provide network access for included environments to Karta technical consultant.
- Provide support from any internal technical teams and assume any responsibilities from any third-party vendor as required to complete the required engaged services.
- Respond to any inquiries in a timely fashion by Karta team.
- Complete any required activities during the engagement.
- Review any custom code (e.g., Javascript, HTML, etc.) in use in the environment. Karta is not responsible for any changes to custom code during platform upgrade(s).

Prerequisites

The following are prerequisites for this engagement:

- Karta will provide all upgrade services remotely.
- Karta will require at least (1) customer technical resource with the appropriate system authorizations and access privileges during the entirety of the engagement.
- Karta will require network access to customer environment(s) including Archer access or work with the customer's technical team through virtual meetings to facilitate delivery of this engagement.
- Customer will provide a functional Archer environment, either on premise or self-administered hosted instance, and properly licensed copy of all software to be used during this engagement.

PREREQUISITES CONT ...

- Customer will provide documents/diagrams detailing the existing tasks/project information in a timely manner.

Project scope exclusions or changes

Any changes to the scope of the engagement must be mutually agreed upon by both Karta and the customer in a separate Statement of Work that details the agreed upon changes. Such changes include:

- Any additional activities not listed in this brief; example, Archer use case upgrades.
- Any changes to Archer application software.
- Any development of custom Archer solutions.
- Any custom code (e.g., Javascript, HTML, etc.) in use in the environment(s) prior to upgrade is not the responsibility of Karta.

Payment terms

See attached quote for payment terms.

Contact us

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