

# Development: Implementing Business Processes

## Lesson 18: Auditing Processes

salesforce

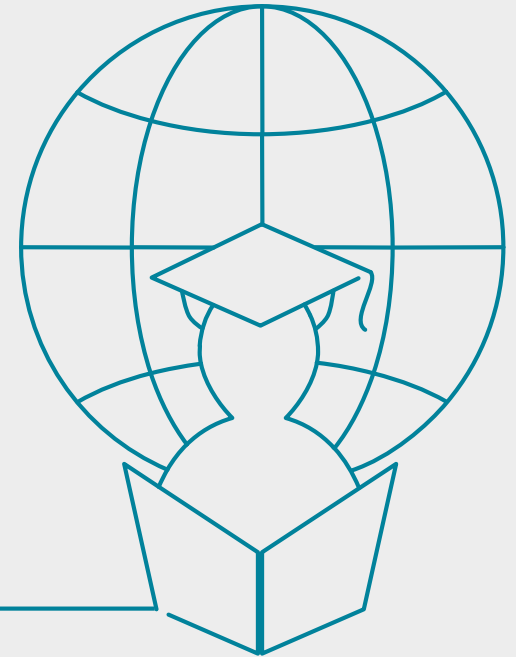
global strategic  
consulting partner



# Lesson Objectives

By the end of this lesson, you will be able to :

- List some of the features of the Force.com platform that allow for auditing of processes
- Examine the setup audit trail to identify configuration changes
- Set up field history tracking to monitor changes to field data
- Analyze options for preventing or recording changes to data in your Force.com application



# 18.1: Auditing Configuration Changes

## Setup Audit Trail

The setup Audit Trail shows changes made to an organization's setup

Up to 20 changes are displayed within the application, but developers can export to a .csv file to see additional changes

Changes are tracked for 180 days

### View Setup Audit Trail

Date	User	Action	Section	Delegate User ?
11/19/2012 8:00:18 PM PST	<a href="mailto:vaishali.kunchur@igate.com">vaishali.kunchur@igate.com</a>	Changed Customer page layout Customer Layout	Custom Objects	
11/19/2012 8:00:18 PM PST	<a href="mailto:vaishali.kunchur@igate.com">vaishali.kunchur@igate.com</a>	Created custom field Term (Picklist) on Customers	Custom Objects	
11/19/2012 7:59:47 PM PST	<a href="mailto:vaishali.kunchur@igate.com">vaishali.kunchur@igate.com</a>	Changed Customer page layout Customer Layout	Custom Objects	
11/19/2012 7:59:47 PM PST	<a href="mailto:vaishali.kunchur@igate.com">vaishali.kunchur@igate.com</a>	Created custom field Risk Class (Picklist) on Customers	Custom Objects	
11/19/2012 7:59:10 PM PST	<a href="mailto:vaishali.kunchur@igate.com">vaishali.kunchur@igate.com</a>	Changed Customer page layout Customer Layout	Custom Objects	
11/19/2012 7:59:10 PM PST	<a href="mailto:vaishali.kunchur@igate.com">vaishali.kunchur@igate.com</a>	Created custom field Face Amount (Number) on Customers	Custom Objects	



## Auditing Changes Using Setup Audit Trail





## 18.2: Auditing Data Field History Tracking

Field History Tracking allows developers to choose up to 20 fields per objects for which they would like to track changes

For most field types, the old and new values are tracked, as well as the date and time of the change and the user who made the change

For long text area fields and multi-select picklists are tracked as edited; however, the old and new values are not noted

**Track old and new values**

Date Closed <input type="checkbox"/>	Date Opened <input type="checkbox"/>
Department <input type="checkbox"/>	Duration <input type="checkbox"/>
Hiring Manager <input type="checkbox"/>	Job Description <input checked="" type="checkbox"/>
Legacy Position Number <input type="checkbox"/>	Location <input type="checkbox"/>
Max Pay <input type="checkbox"/>	Min Pay <input type="checkbox"/>
Owner <input type="checkbox"/>	Pay Grade <input type="checkbox"/>
Priority <input type="checkbox"/>	Record Type <input type="checkbox"/>
Status <input type="checkbox"/>	Sub-Status <input type="checkbox"/>
Title <input type="checkbox"/>	Type <input type="checkbox"/>

**Position Detail** [Edit](#) [Delete](#) [Clone](#) [Sharing](#)

Title	Black Box Tester	Owner	vaishali kunchur <a href="#">[Change]</a>
Type	Full Time	Priority	
Department	Engineering	Status	Open
Location	San Francisco, CA	Sub-Status	Pending
Pay Grade	ENG-100	Date Opened	11/4/2012 11:29 PM
Hiring Manager		Date Closed	
Duration			
Legacy Position Number			
Start Date			
Created By	vaishali kunchur, 11/4/2012 11:35 PM	Last Modified By	vaishali kunchur, 11/19/2012 9:21 PM

► Description

► Compensation

► Technical Skills

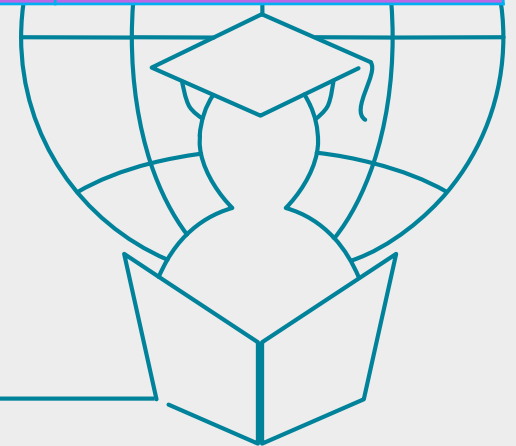
[Edit](#) [Delete](#) [Clone](#) [Sharing](#)

**Position History** [Position History Help](#)

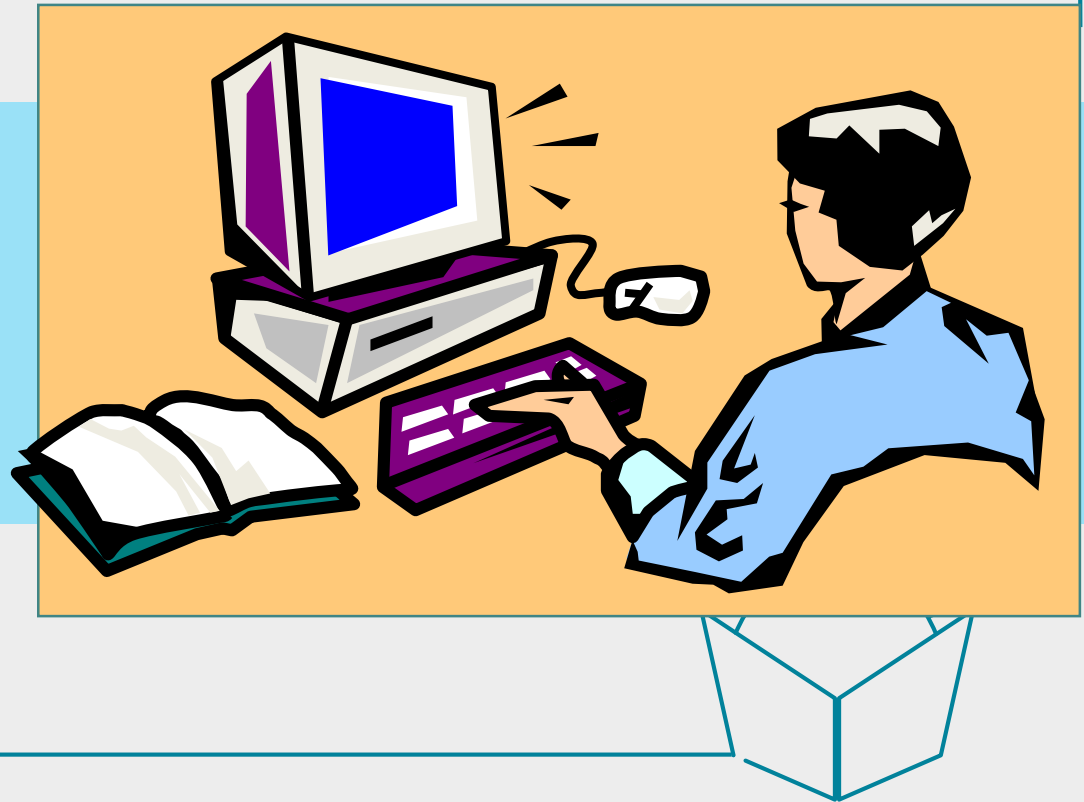
Date	User	Action
11/19/2012 9:21 PM	vaishali kunchur	Changed Job Description from White box tester to Black box tester for testing .Net Apps.
11/19/2012 9:20 PM	vaishali kunchur	Changed Job Description from Black box testing - .Net to White box tester.
11/19/2012 9:17 PM	vaishali kunchur	Changed Job Description from Black box testing to Black box testing - .Net.
11/4/2012 11:35 PM	vaishali kunchur	Created.

## 18.2: Auditing Data Logging Comparison

	Debug Logs	Field History	Setup Audit Trail
Tracks	Errors and system processes performed by end users or code	Data values for fields	Configuration changes by administrators and developers
Examples	Execution of Force.com code trigger or workflow rule	Updates to Status or Pay Grade field	Change to a workflow rule, field data type



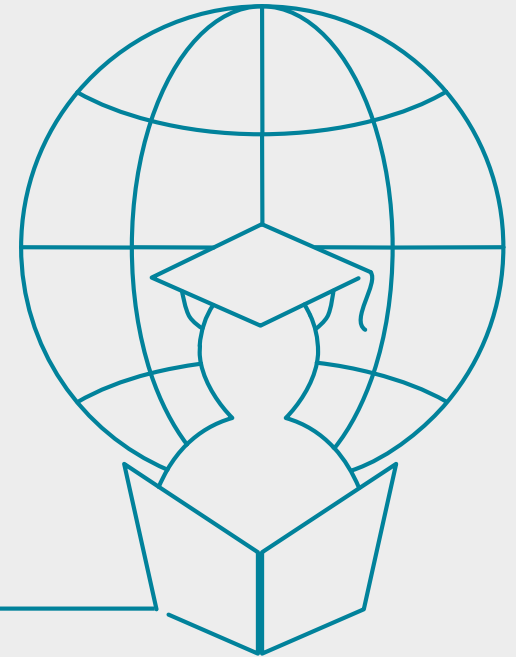
## Auditing Changes to Data



## 18.3: Keeping Track of Unauthorized Changes Which Tool to Use?

A developer at Universal Containers need to make sure that the format of a contract number for contractors in temporary positions always follows the same format  
The contract number should not even be entered in the system if it doesn't follow the proper format

Which tool should the developer use?

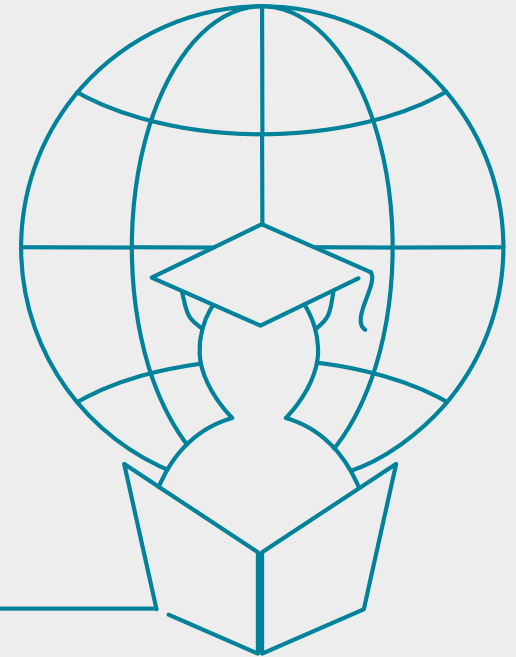




## 18.3: Keeping Track of Unauthorized Changes Which Tool to Use? (cont.)

Sometimes contractors in temporary positions will stay in that position throughout the duration of multiple contracts. Universal Containers would like to track any changes to the contract number field

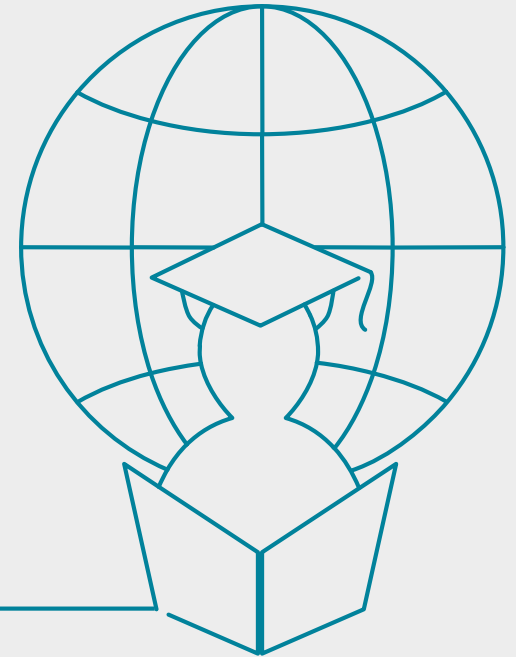
Which tool should the developer use?



## 18.3: Keeping Track of Unauthorized Changes Which Tool to Use? (cont.)

A developer left Universal Containers and auditors would like to understand the changes that the developer made to the configuration of Salesforce before departing.

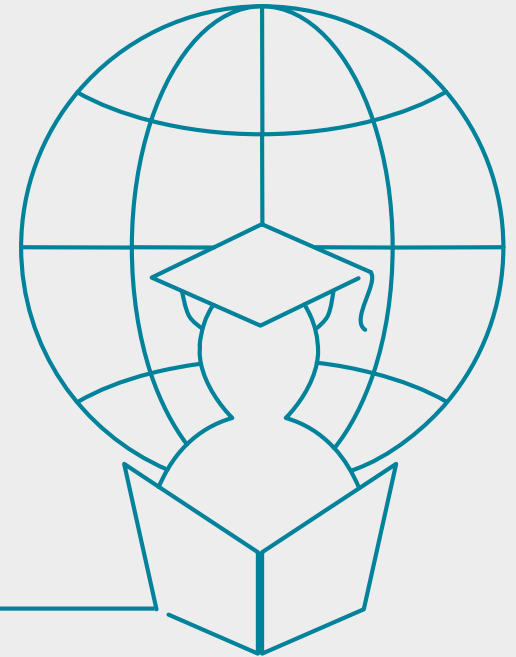
Which tool should the developer use?



## 18.3: Keeping Track of Unauthorized Changes Which Tool to Use? (cont.)

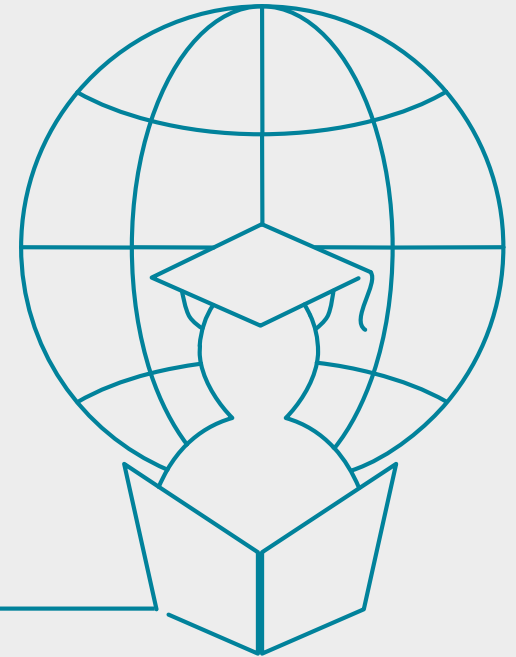
When new candidate records are created, Universal Containers tracks whether or not a visa is required for that candidate. If a candidate requires a visa, Universal Containers would like to send an email to the recruiter to ensure that the proper hiring procedures are followed.

Which tool should the developer use?

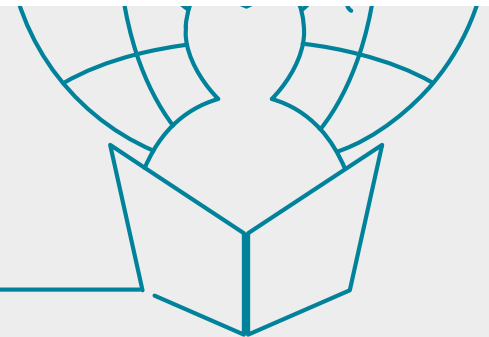


## 18.3: Keeping Track of Unauthorized Changes Which Tool to Use? (cont.)

If Universal Containers wanted to not only send an email if a candidate required a visa, but also require approvals from the hiring manager and HR, which tool would you use?



## Automating Business Processes Visual Workflow Building a Flow in Cloud Flow Designer



What changes are tracked in the Setup Audit Trail?

Field History Tracking tracks both the old and new values of fields for all field types  
True or False

