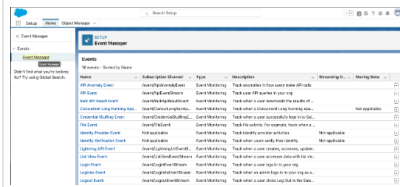


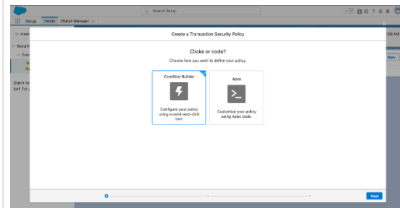
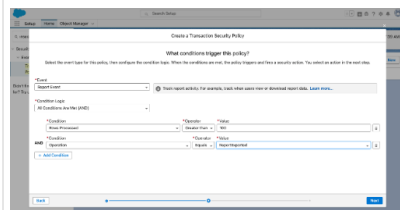
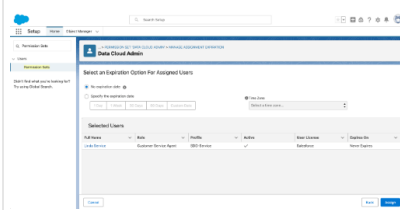


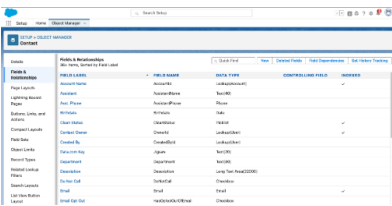
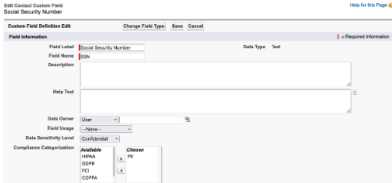
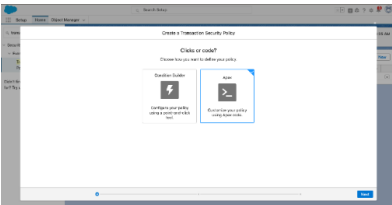
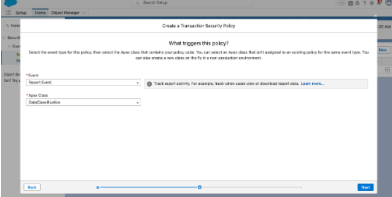
Workshop - How to Strengthen Your Data Governance with Event Monitoring

Setup

Event Monitoring is a paid add-on that creates streams of events based on events that happen in Salesforce

Instructions/Demo Flow

Instructions	Screenshot
In the 'Quick Find' box of the Setup screen, search for 'Event Manager' and click Event Manager	
Click the dropdown next to Report Event Click Enable Streaming and Enable Storage Do the same for LoginAs Event Do the same for Lightning URI Event	
In the 'Quick Find' box of the Setup screen, search for 'Transaction Security Policies' and click Transaction Security Policies	
Click New	
Click Condition Builder Click Next	
In the Event dropdown list, select Report Event Use the following criteria: Condition: Rows Processed Operator: Greater than Value: 100 Click Add Condition Use the following criteria: Condition: Operation Operator: Equals Value: ReportExported Click Next	
Set the following on the action screen Action: Block Notification: In-App notification Recipient: User User Name: Block Big Export Description: no exports of > 100 rows Status: Enabled Click Finish	

Click the App Launcher and enter Reports Click Reports																																																																															
Run the Cases Report Notice this report has 1,412 records																																																																															
Click Edit > Export Click Export again	<div>Access Blocked</div> <div>The operation you requested isn't allowed due to a security policy in your organization. Contact your administrator for more information about security policies.</div>																																																																														
Apex Transaction Security Policy																																																																															
<p>In Setup click Object Manager</p> <p>In the Quick Find box enter Contact</p> <p>Click the Contact object to open it</p> <p>Click Fields & Relationships</p>	 <table><tr><th>Field Name</th><th>Data Type</th><th>Required</th></tr><tr><td>Account Name</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Phone</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Email</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Address</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account City</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account State</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Country</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Zip</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Fax</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Website</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Description</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Type</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Status</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Created Date</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Last Modified Date</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Created By</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Last Modified By</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Created On Behalf Of</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Last Modified On Behalf Of</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Created By User Id</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Last Modified By User Id</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Created By Name</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Last Modified By Name</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Created By Email</td><td>Text (255)</td><td>✓</td></tr><tr><td>Account Last Modified By Email</td><td>Text (255)</td><td>✓</td></tr></table>	Field Name	Data Type	Required	Account Name	Text (255)	✓	Account Phone	Text (255)	✓	Account Email	Text (255)	✓	Account Address	Text (255)	✓	Account City	Text (255)	✓	Account State	Text (255)	✓	Account Country	Text (255)	✓	Account Zip	Text (255)	✓	Account Fax	Text (255)	✓	Account Website	Text (255)	✓	Account Description	Text (255)	✓	Account Type	Text (255)	✓	Account Status	Text (255)	✓	Account Created Date	Text (255)	✓	Account Last Modified Date	Text (255)	✓	Account Created By	Text (255)	✓	Account Last Modified By	Text (255)	✓	Account Created On Behalf Of	Text (255)	✓	Account Last Modified On Behalf Of	Text (255)	✓	Account Created By User Id	Text (255)	✓	Account Last Modified By User Id	Text (255)	✓	Account Created By Name	Text (255)	✓	Account Last Modified By Name	Text (255)	✓	Account Created By Email	Text (255)	✓	Account Last Modified By Email	Text (255)	✓
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<p>Scroll down and click on Social Security Number</p> <p>Click Edit</p> <p>Set Data Sensitivity Level to Confidential</p> <p>Set Compliance Categorization to PII</p>																																																																															
<p>Create a new Transaction Security Policy</p> <p>Quick Find and Select: Transaction Security Policy</p> <p>Click New</p> <p>Click Apex</p> <p>Click Next</p>																																																																															
<p>Set Event to Report Event</p> <p>Set Apex Class to DataClassification</p> <p>Click Next</p>																																																																															

Use the following settings on the actions
Action: **Block**
Notification: **In-App notification**
Recipient: **User User**
Name: **Confidential in Report**
Description: **No confidential fields in reports, ever**
Status: **Enabled**

Click **Finish**

Test the new policy with reports

Click the App Launcher and enter **Reports**
Click **Reports**
Run the **Cases Report**
Notice the error message

The Cases Report contains a confidential field

Run **Cases Report 2**
Click **Edit**

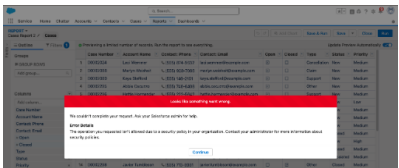
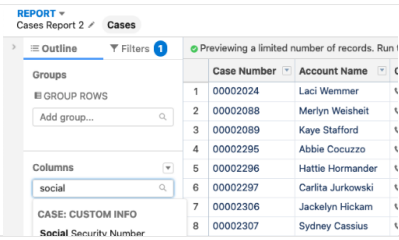
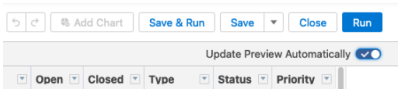
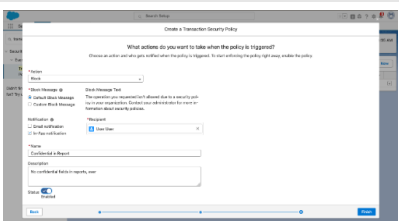
In Report Builder enable Update Preview Automatically

Try adding Social Security Number to the report

Enter **Social** in the columns search box

Click **Social Security Number**

Notice the error that is immediately displayed even in edit mode



because we added streaming and storage to the object, we could also be taking action in 3rd party systems, or go back through the LogFiles for ReportEvent to see which user tried to use which field from which object on which report when. It's all captured with Event Monitoring