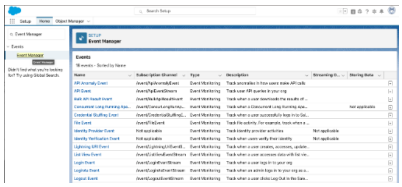
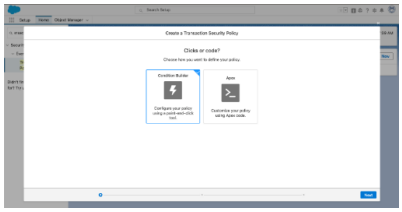
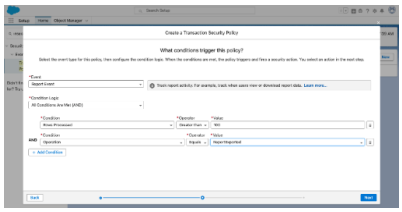
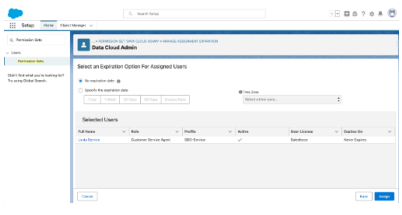
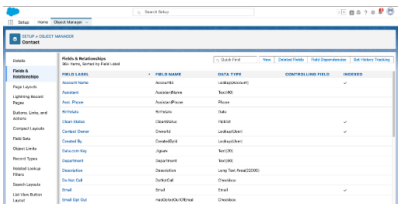
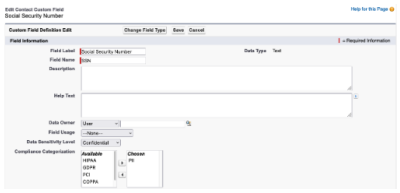
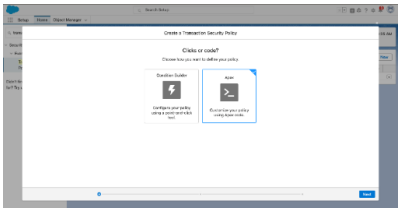
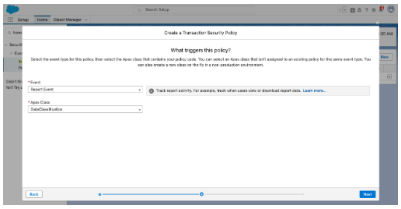
Workshop - How to Strengthen Your Data Governance with Event Monitoring

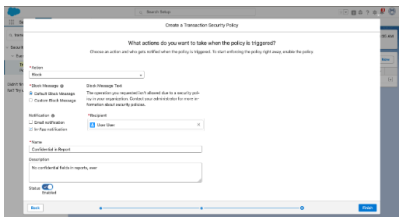
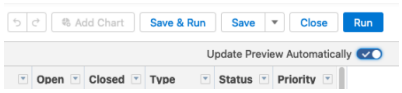
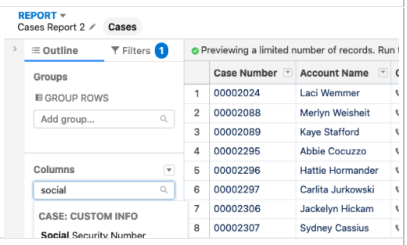
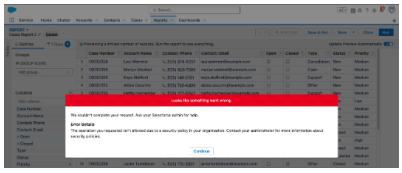
⚙️ Setup

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	
Apex Transaction Security Policy	
In Setup click **Object Manager** In the Quick Find box enter **Contact** Click the **Contact** object to open it Click **Fields & Relationships**	
Scroll down and click on **Social Security Number** Click **Edit** Set Data Sensitivity Level to **Confidential** Set Compliance Categorization to **PII**	
Create a new Transaction Security Policy Quick Find and Select: **Transaction Security Policy** Click **New** Click **Apex** Click **Next**	
Set Event to **Report Event** Set Apex Class to **DataClassification** Click **Next**	

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 S**ocial** in the columns search box Click **Social Security Number**	
Notice the error that is immediately displayed even in edit mode	
ecause 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	