Audit data and user activity Dynamics CRM 2015

The Microsoft Dynamics CRM auditing feature logs changes that are made to customer records and user access so that you can review the activity later. The auditing feature is designed to meet the auditing, compliance, security, and governance policies of many regulated enterprises.

The audit logs help the Microsoft Dynamics CRM administrator answer questions such as:

1. Which user was accessing the system and when?
2. Who updated this field value on this record, and when?
3. What was the previous field value before it was updated?
4. What actions has this user taken recently?
5. Who deleted this record?
6. What locale was used to make the update?

The following operations can be audited:

1. Create, update, deactivate, and delete operations on records.
2. Changes to the sharing privileges of a record.
3. The N: N association or disassociation of records.
4. Changes to security roles.
5. Audit changes at the entity, attribute, and organization level. For example, enabling audit on an entity.
6. Deletion of audit logs.
7. For changes made to entity fields that can be localized, such as the Product entity name or description fields, the locale Id (LCID) appears in the audit record.

System administrators and System Customizers can start or stop auditing for an organization.

Important
For Microsoft Dynamics CRM (on-premises), you may notice that auditing can significantly increase the size of the organization database over time. You can delete audit logs by going to Settings > Auditing > Audit Log Management. Additionally, you may want to stop auditing for maintenance purposes. Stopping auditing stops tracking for the organization during the period until auditing is started again. When you start auditing again, the same auditing selection is maintained that was previously used.

Start or stop auditing for an organization

This task requires the System Administrator or System Customizer security role or equivalent permissions.

1. Go to Settings > Administration > System Settings. You can also go to Settings > Auditing > Global Audit Settings.
2. On the Auditing tab, click to check the Start Auditing check box to start auditing. Click to clear the Start Auditing check box to stop all auditing.
3. Select the entities you want to track. To start or stop auditing on specific entities, select or clear the following check boxes:
4. Audit user access. Tracks when a user accesses Microsoft Dynamics CRM including the user name and time.
5. Common Entities. Tracks common entities such as Account, Contact, Goal, Product, and User.
6. Sales Entities. Tracks sales-related entities, such as Competitor, Opportunity, Invoice, Order, and Quote.
7. Marketing Entities. Tracks Campaign entity activity.
8. Customer Service Entities. Tracks Case, Contract, Queue, and Service entity activity.
9. Choose OK.

View audit logging details

System Administrators can view the activity for the entities that are enabled for audit logging.

1. Go to Settings -> Auditing -> Audit Summary View.
2. In the Audit Summary View, you can do the following:
3. Choose Enable/Disable Filters to turn on filtering. Then, you can filter on a specific event, such as Delete actions.
4. Choose an Event to view specific details about the activity, such as the field changes that were made during an update to a record and who performed the update.
5. Choose the Refresh button to view the most recent activity.

Enable or disable entities and fields for auditing

System Administrator or System Customizers can change the default audit settings for entities and for specific fields for an entity.

To enable or disable auditing for an entity.

1. In the Navigation Pane, choose Settings. Then under System, choose Auditing.
2. In the Audit area, choose Entity and Field Audit Settings.
3. Under Components, expand Entities.
4. Open the entity for which you want to enable or disable auditing.
5. To start auditing, on the General tab, in the Data Services section, select the Auditing check box to enable auditing or clear the Auditing check box to disable it.
6. By default, when you start or stop auditing for an entity, you also start or stop auditing for all the fields of this entity.
7. Choose Save.

8. Publish the customization. To publish for a single entity, choose the entity, such as Account, and then choose Publish on the toolbar.

To enable or disable auditing for specific fields on an entity.

1. Under the entity for which you want to enable or disable auditing with specific fields, choose Fields.
2. To enable or disable a single field, open the field and in the Auditing section, select Enable or Disable.
3. To enable or disable more than one field, select the fields that you want, on the toolbar choose Edit. In the Edit Multiple Fields dialog box, in the Auditing area choose Enabled or Disabled.
4. Choose Save.
5. Publish the customization. To publish for a single entity, choose the entity, such as Account, and then choose Publish on the Actions toolbar.