

# Auditing

STRATEGY ■ CONSULTING ■ SUPPORT



# Agenda

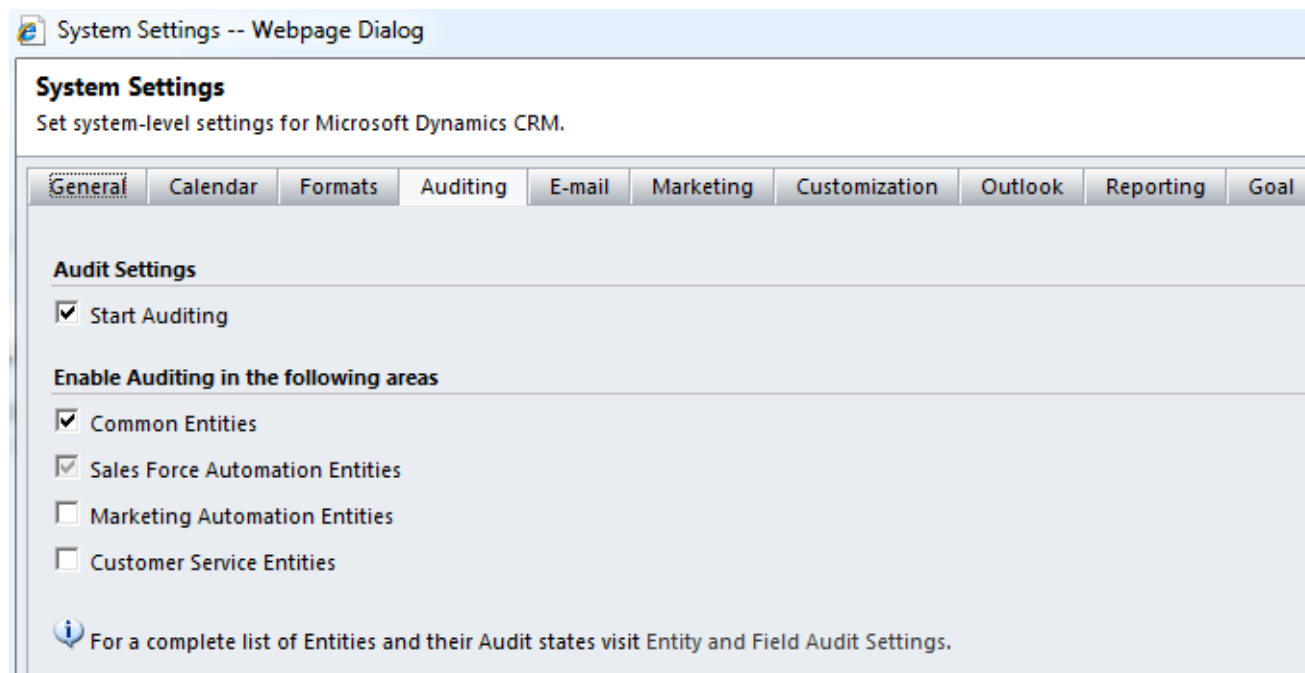
- Auditable Entities and Attributes
- Organization Level Control
- Enabling Auditing per Entity
- Enabling Auditing by Field
- Disabling Auditing
- Auditing Security Settings
- Auditing Options
- Auditing on Record Level
- Export/Import of Auditing Metadata Settings

# Auditable Entities and Attributes

- Available for most entities
  - All customizable entities
  - Non-customizable entities cannot be audited
- Disabled by default
- Enabled at the entity and field level
- Tracks creates, deletes, and updates

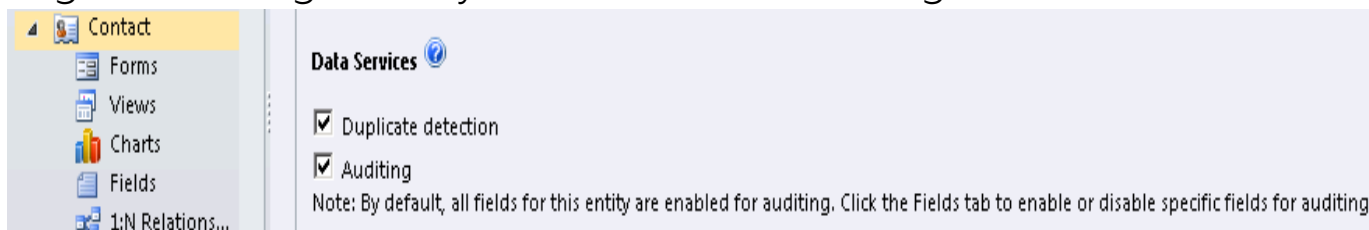
# Organization Level Control

- Settings – Auditing – Global Audit Settings
- Organization level flag (Start Auditing)
- Enable Auditing in the following areas
  - Assists admin user when enabling auditing

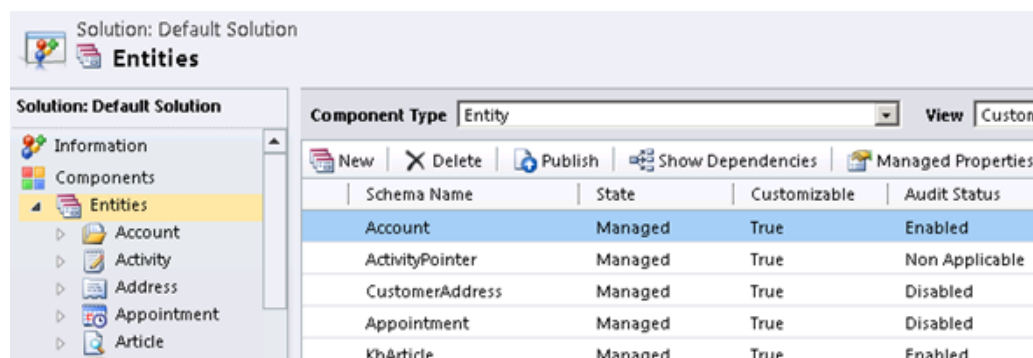


# Enabling Auditing per Entity

- Settings – Auditing – Entity and Field Audit Settings



- Quick check to see if auditing is enabled per Entity
  - Audit Status on the Entities component



# Enabling Auditing by Field

- Settings – Auditing – Entity and Field Audit Settings

Field  
**Account Name of Account**

Common  
Information

General

Schema

Display Name \*

Name \*

Field Security ☐ Enable ☐ Disable

Auditing \* ☒ Enable ☐ Disable

- Quick check to see if auditing is enabled by Field
  - Audit Status on the specific entity record

Account  
Fields

Solution: Default Solution

View: All

Schema Name	Display Name	Type	State	Audit Status
IndustryCode	Industry	Option Set	Managed	Enabled
LastUsedInCampaign	Last Date Includ...	Date and Time	Managed	Enabled
MarketCap	Market Capitali...	Currency	Managed	Enabled
MarketCap_Base	Market Capitali...	Currency	Managed	Enabled

# Disabling Auditing

- Possible to disable auditing at the following levels:
  - Organization
  - Entity
  - Field
- Enabling/Disabling auditing is tracked in the Audit Summary View

# Auditing Security Settings

- Defined under the Core Records – Miscellaneous Privileges section of the security role
- User must have the System Administrator or System Customizer role to enable/disable auditing



# Auditing Options

- Settings – System – Auditing
  - Global Audit Settings
  - Entity and Field Audit Settings
  - Audit Summary View
    - Central point of audit administration
    - Filter based on specific criteria
  - Audit Log Management
    - Location to delete log files

# Auditing on Record Level

- Possible to view audit data from the record level
- “Filter on” functionality available

**Information**

- General
- Details
- Contacts
- Notes & Activities
- Preferences

**Related**

Common

- More Addresses
- Activities
- Closed Activities
- Sub-Accounts
- Contacts
- Relationships
- Connections
- Documents
- Audit History**

**Account** Accounts

**Advanced Components (sample)**

Primary Contact: [Brain LaMee \(sample\)](#) Preferred Method of Contact: Any Owner: [First name Last name](#)

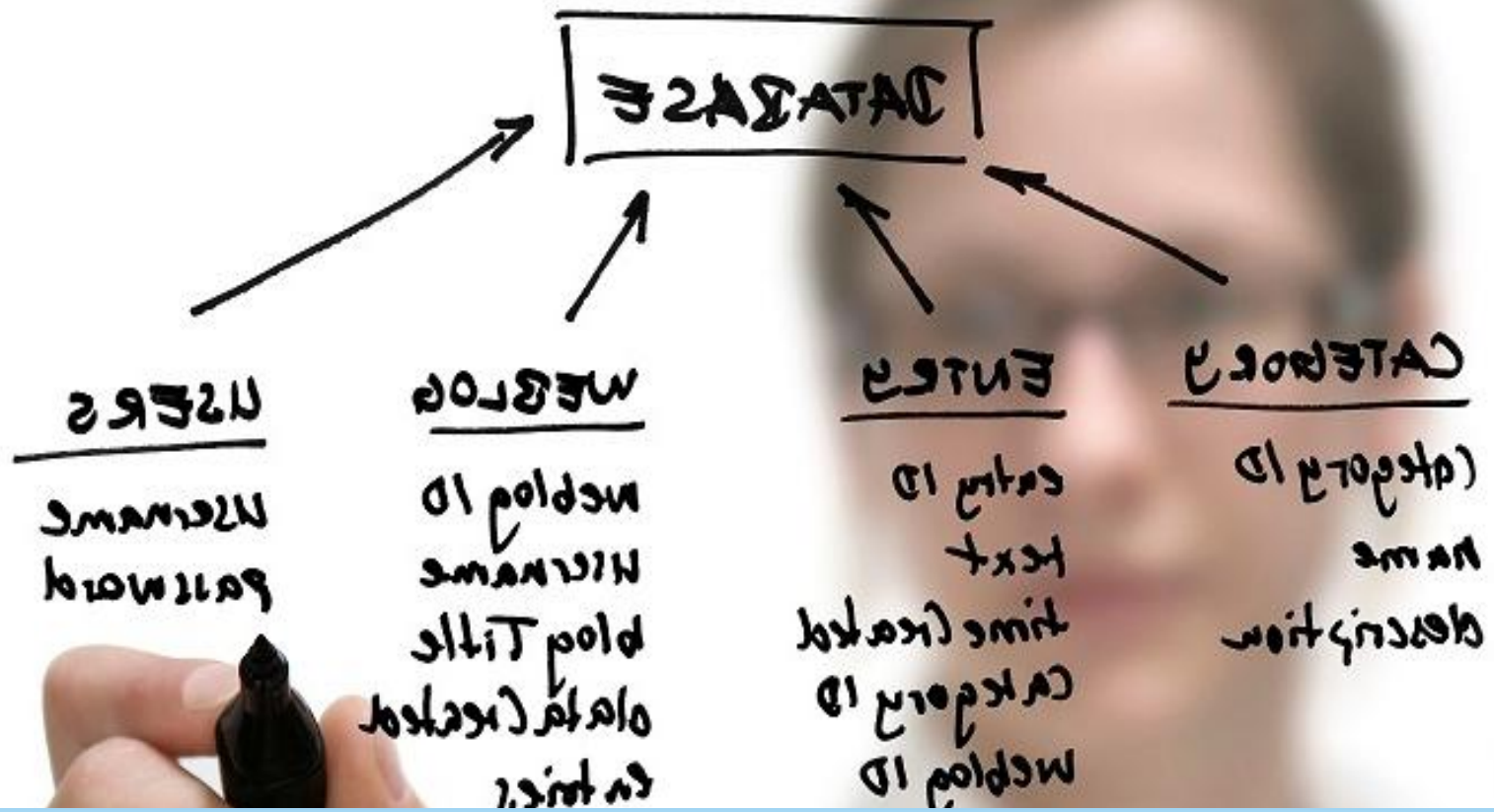
Credit Limit: Annual Revenue:

Filter on: Address 1: Street 1

	Changed Date	Changed By	Event	Changed Field	Old Value	New Value
<input checked="" type="checkbox"/>	10/18/2010 1:46 PM	<a href="#">First name Last name</a>	Update	Address 1: Street 1	102 Red Oak Lane	201 Red Oak Lane
<input type="checkbox"/>	10/18/2010 1:46 PM	First name Last name	Update	Address 1: Street 1	101 Red Oak Lane	102 Red Oak Lane
<input type="checkbox"/>	10/18/2010 1:45 PM	First name Last name	Update	Address 1: Street 1	100 Red Oak Lane	101 Red Oak Lane
<input type="checkbox"/>	10/18/2010 12:59 PM	First name Last name	Audit Enabled			
<input type="checkbox"/>	10/18/2010 12:59 PM	First name Last name	Audit Disabled			
<input type="checkbox"/>	10/18/2010 12:32 PM	First name Last name	Create	Address 1: Street 1		

# Export/Import of Auditing Metadata Settings

- Exporting and importing of auditing settings can be accomplished through the exporting/importing of customizations
  - Click Settings, click Customizations, click Solution, and then click Export, or
  - Click Settings, click Customizations, click Customize the System, and then click Export Solution.



# Questions?