Filtering the Data Management Audit Trail

Last Modified on 08/07/2024 1:41 pm EDT

Overview

The **Data Management Audit Trail** feature lists all object changes made in an Org.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Data Management Audit Trail feature.

Related Information/Setup

Please refer to the Exporting Data Management Audit Trail Records article for information on exporting records from the Data Management Audit Trail.
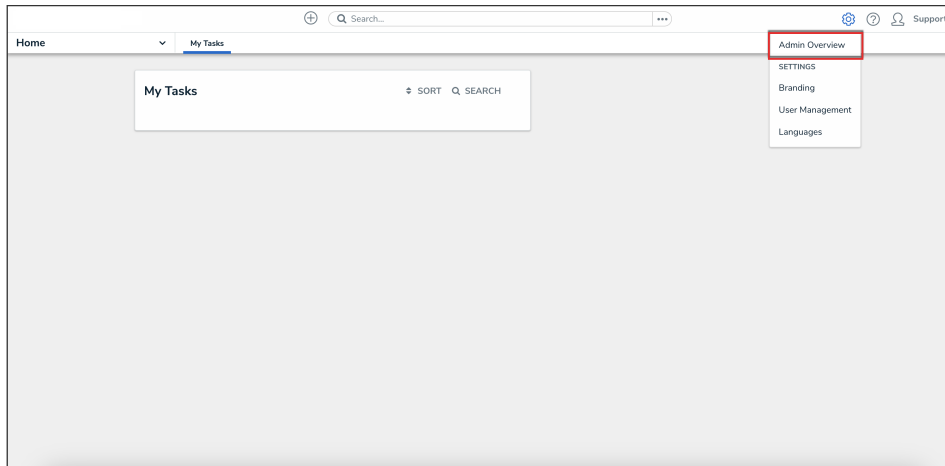
Navigation

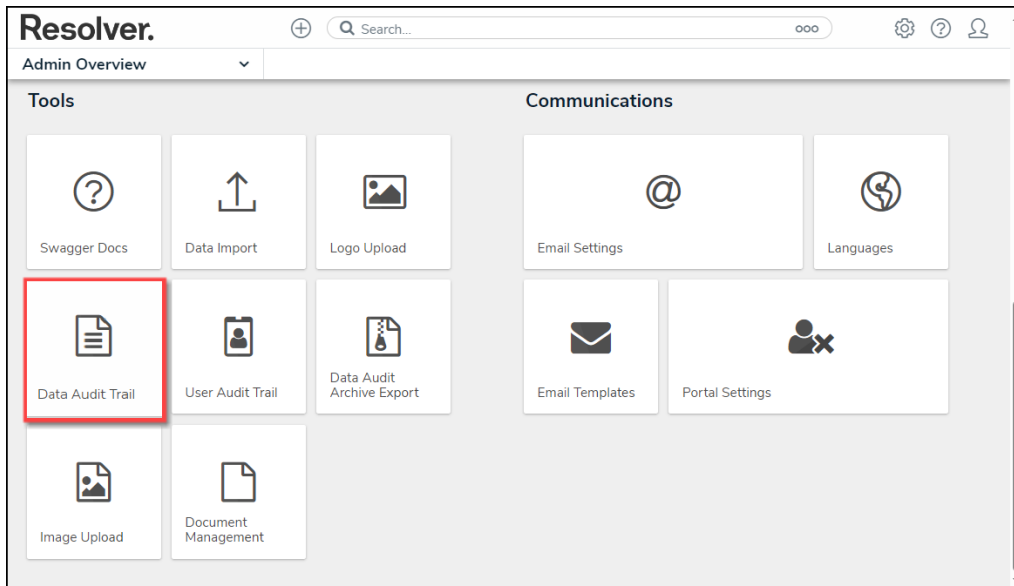1. From the **Home** screen, click the **Administration** icon.
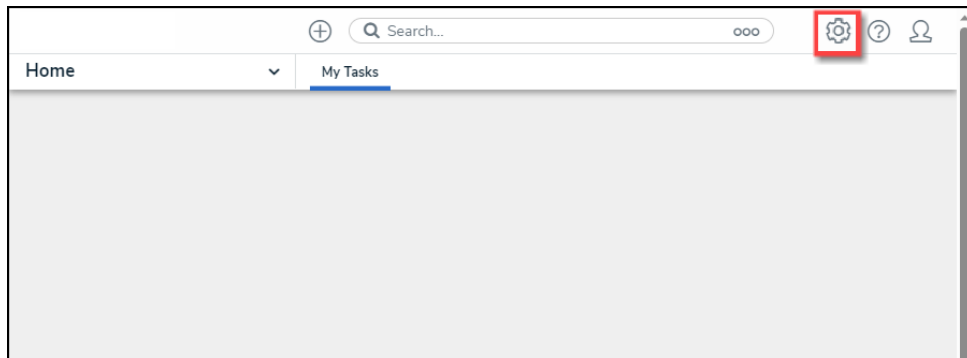
Administration Icon

2. From the Administrator settings menu, click **Admin Overview**.

Administrator Settings Menu

3. From the **Admin: Overview** screen, click the **Audit Data Trail** tile under the **Tools** section.

Audit Data Trail Tile

Filtering the Data Management Audit Trail

By default, the **Data Management Audit Trail** displays an Org's changes in reverse chronological order. Follow these steps to create a more targeted Data Management Audit Trail view.

1. From the **Admin: Data Management Audit Trail** screen, click the **Filter and Export** arrow to expand the dropdown menu.
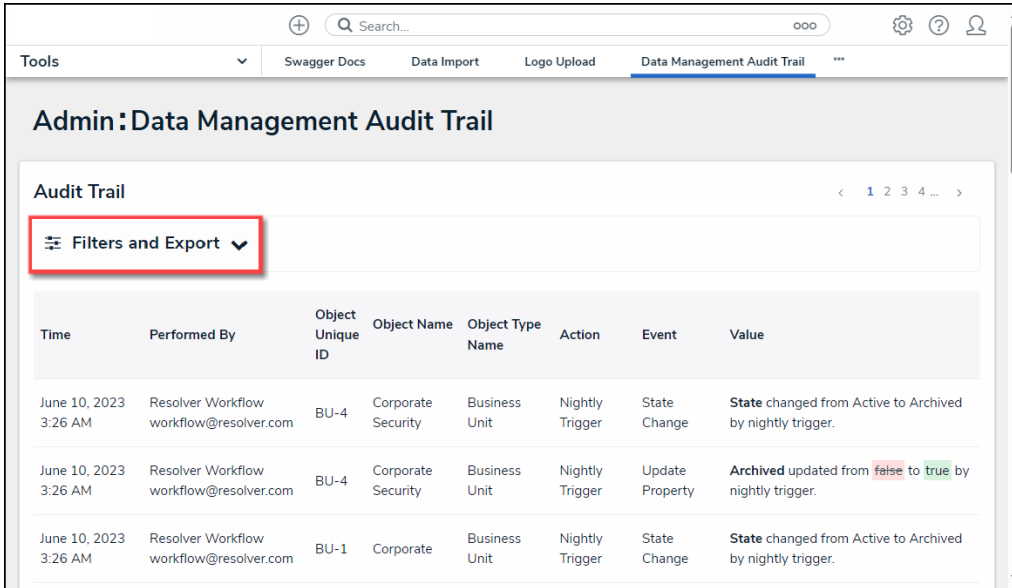
Filter and Export Arrow

2. Using the **Filter** fields, narrow the Data Management Audit Trail list.

   ○ **Date:** Select a date range using the **From** and **To** date fields by clicking a date from the *Calendar* pop-up. The system will return records within the data range specified.

   ○ **Performed By:** Select the user that performed the action from the dropdown menu.

   ○ **Object Unique ID:** Enter an **Object's Unique ID** in the field.

   ○ **Object Name:** Enter the **Object's Name** in the field.

   ○ **Object Type Name:** Select the **Object Type** from the **Object Type Name** dropdown menu.

   ○ **Action:** An Action is a user or system-driven behavior that accesses or applies changes to data.

   ○ **Event:** An Event is the result of an action and drives a specific change to the data.
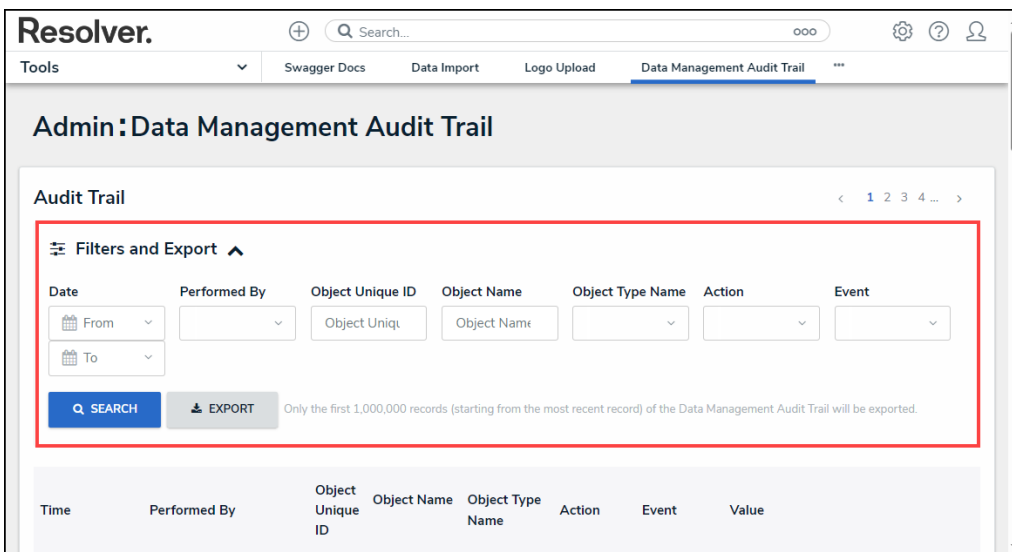
Filter Fields

3. After you have applied search filters, click the **Search** button to return the search results.
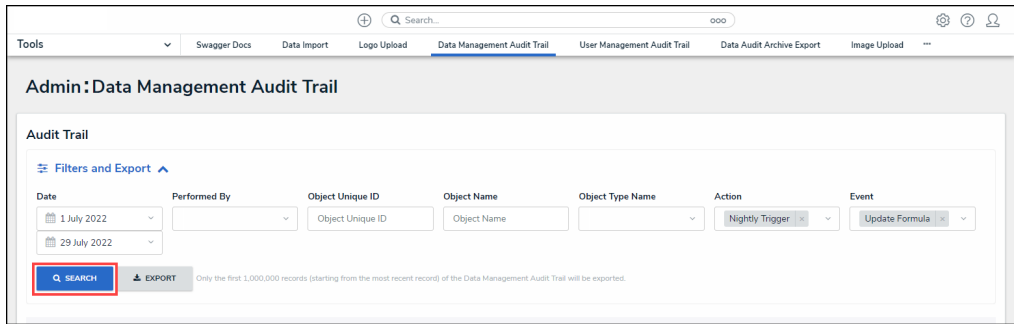

Search Button

> **Note:**
> A system-generated message will appear if there are more than 1,500 event records. Please use or adjust your filters to narrow down your results.

4. The following information will be returned as part of the search results:

   ○ **Time:** The time the action occurred displayed in local time according to the user's settings.

   ○ **Performed By:** The User who performed the change. A Flag appears next to the value if an Administrator impersonates a user when changes are made. You can see the Administrator impersonating the User by hovering over the Flag.

   ○ **Object Unique ID:** The alpha-numeric ID Resolver automatically assigns to identify an object throughout the Organization.

   ○ **Object Name:** The Object's Name.

   ○ **Object Name Type:** The Object's category type.

   ○ **Action:** The change to the Object initiated by a User or the System (e.g., Nightly Trigger).

   ○ **Event:** The Object's data change that occurred due to the Action (e.g., State Change).

   ○ **Value:** The **Value** details the changes performed on the Object.
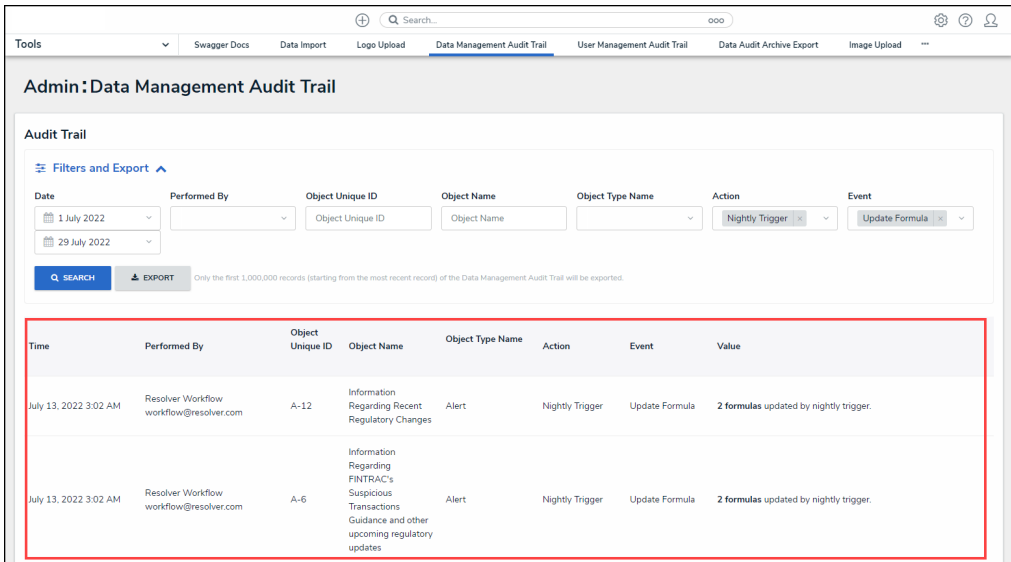
Search Results Section

5. Click within a row to open extended Object details.
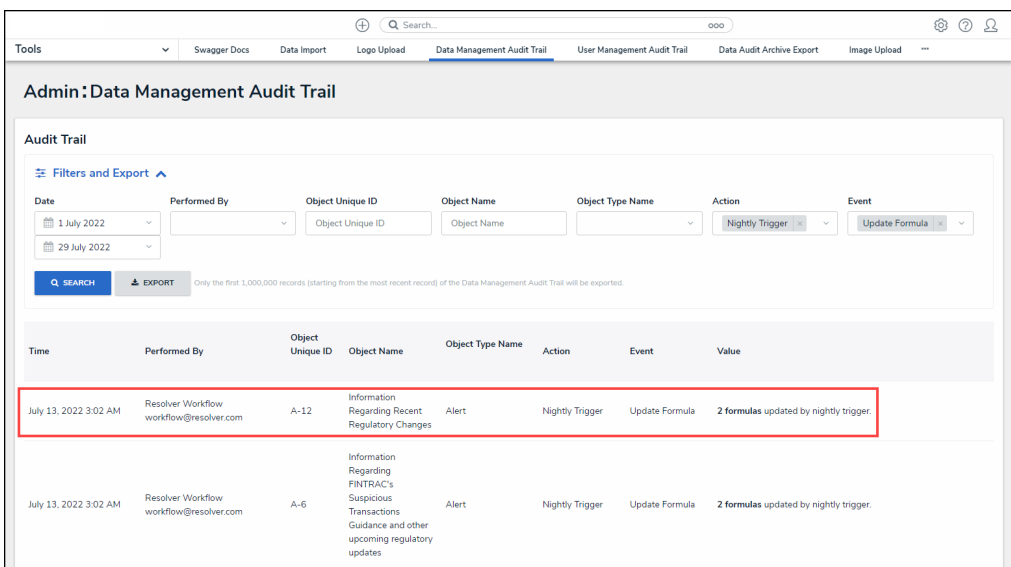
Object Details Pop-up

6. The following additional information is displayed on the **Object Details** pop-up:
    o **Object ID:** The **Object ID** is a numeric ID that the system automatically assigns to an Object when it is created.
    o **Object External Reference ID:** The **Object's External Reference ID** is an alpha-numeric ID that identifies the Object throughout the Organization.
    o **Object Type ID:** The **Object Type ID** is a numeric ID assigned by a User to identify Object Types throughout the Organization.
    o **Object Type External Reference ID:** The **Object Type External Reference** is an alpha-numeric code automatically assigned by the system to identify an Object Type within the Organization.
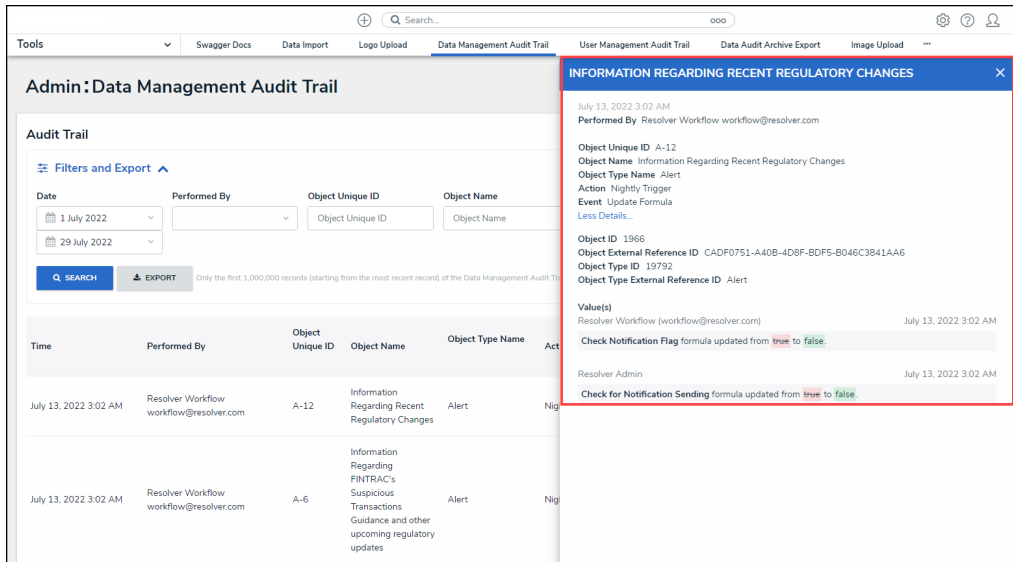
Object Details Pop-up

Actions and Events

The following table outlines the Actions and all the corresponding Events that can occur within that Action:

Action Name	Event Name
Add Comment	Add Comment
Add Relationship	Add Relationship
	Assign Role
	Create Object
	State Change
	Update Field
	Update Formula
	Update Property
Assignment Sync	Add Relationship
	Assign Role
	Create Object
	State Change
	Update Field
	Update Formula
	Update Properties
Assign Role on Object	Assign Role
Calculate Formula	Update Formula
Create Object	Add Relationship

Action Name	Event Name
	Assign Role
	Create Object
	State Change
	Update Field
	Update Formula
	Update Properties
Create Object from Email	Add Relationship
	Assign Role
	Create Object
	State Change
	Update Field
	Update Formula
	Update Properties
Data Import	Add Relationship
	Assign Role
	Create Object
	Remove Relationship
	State Change
	Update Field
	Update Formula
	Update Properties
Delete Object	Delete Object
	Remove Relationship
	Unassign Role
	Update Formula
Delete User Group	Unassign Role
Delete State	State Change
	Update Formula
	Update Properties
Download Attachment	Download Attachment
Download Report	Download Report
Edit Object	Discard Changes
	Edit Online
	Update Field
	Update File Name
	Update File Version

Action Name	Event Name
	Update Formula
	Update Properties
Launch Assessment	Add Relationship
	Assign Role
	Create Object
	State Change
	Update Field
	Update Formula
	Update Properties
Nightly Trigger	Add Relationship
	Create Object
	Remove Relationship
	State Change
	Unassign Role
	Update Field
	Update Formula
	Update Properties
Preview Attachment	Preview Attachment
Remove Relationship	Remove Relationship
	Update Formula
Remove User	Unassign Role
Trigger Object	Add Relationship
	Assign Role
	Create Object
	Remove Relationship
	State Change
	Unassign Role
	Update Field
	Update Formula
	Update Properties
Unassign Role on Object	Unassign Role
Update Comment	Comment State Change
	Update Comment
Update Field Option	Update Field
	Update Formula
Update State	Update Properties

Action Name	Event Name
View Report	View Report