# Filtering the Data Management Audit Trail

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# Overview

The **Data Management Audit Trail** feature lists all Object changes made in an Organization.

# 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.
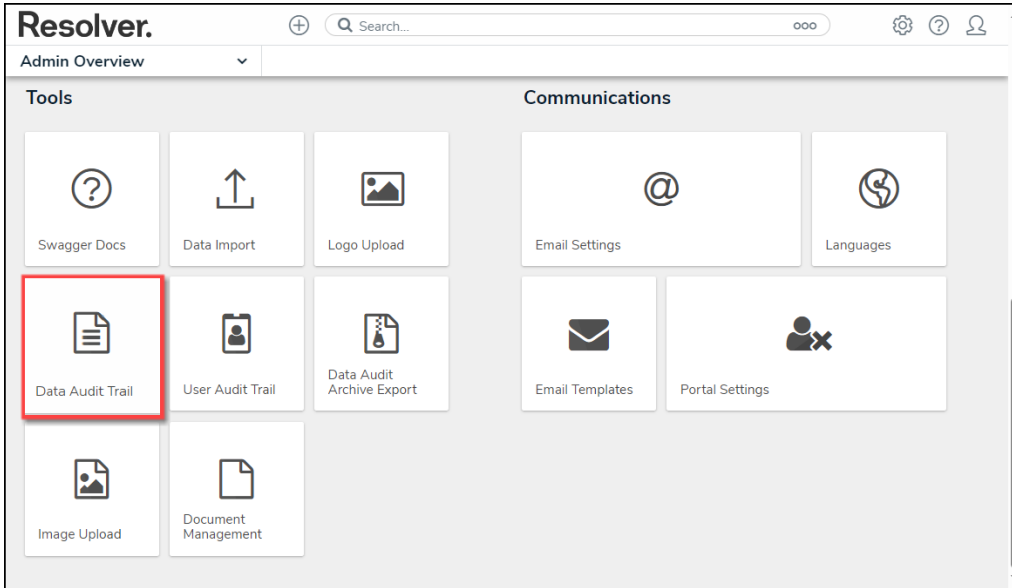
# Navigation

1. From the **Home** screen, click the **System** icon.
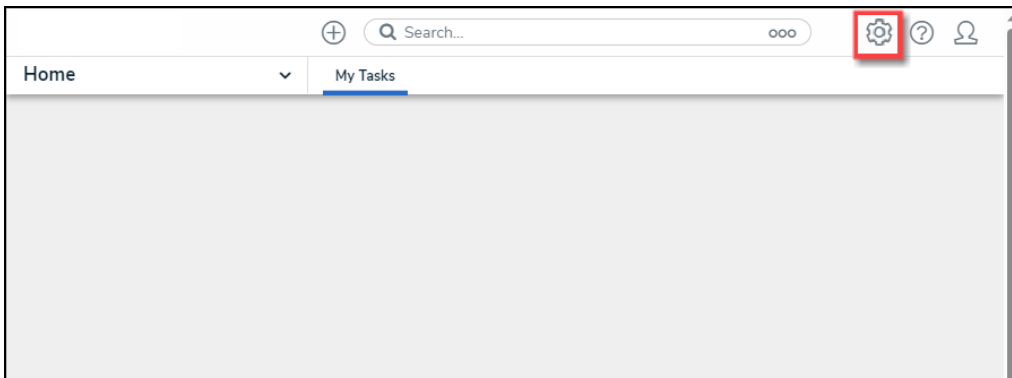


*System Icon*

2. 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 Organization'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.
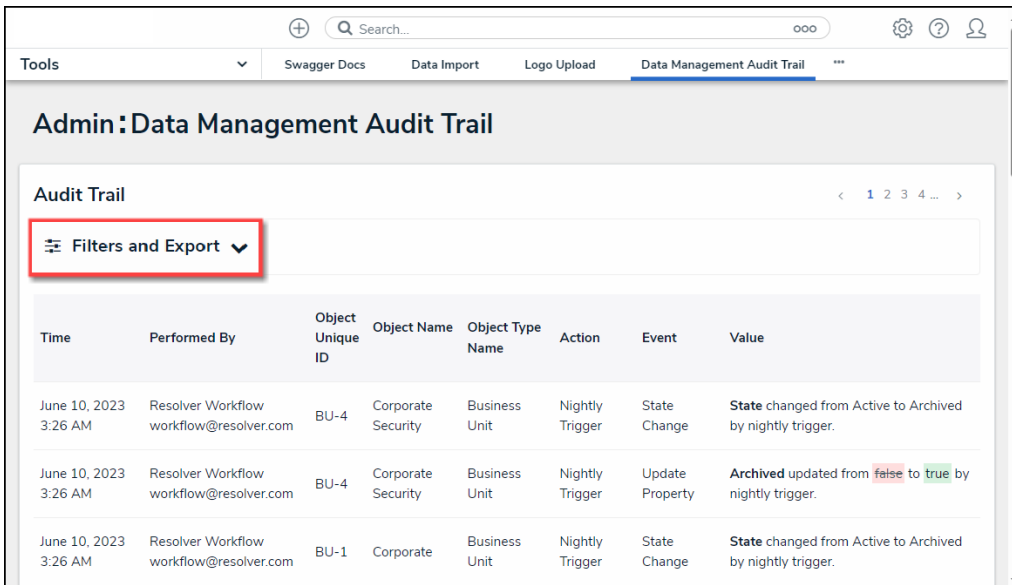


*Filter and Export Arrow*

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.
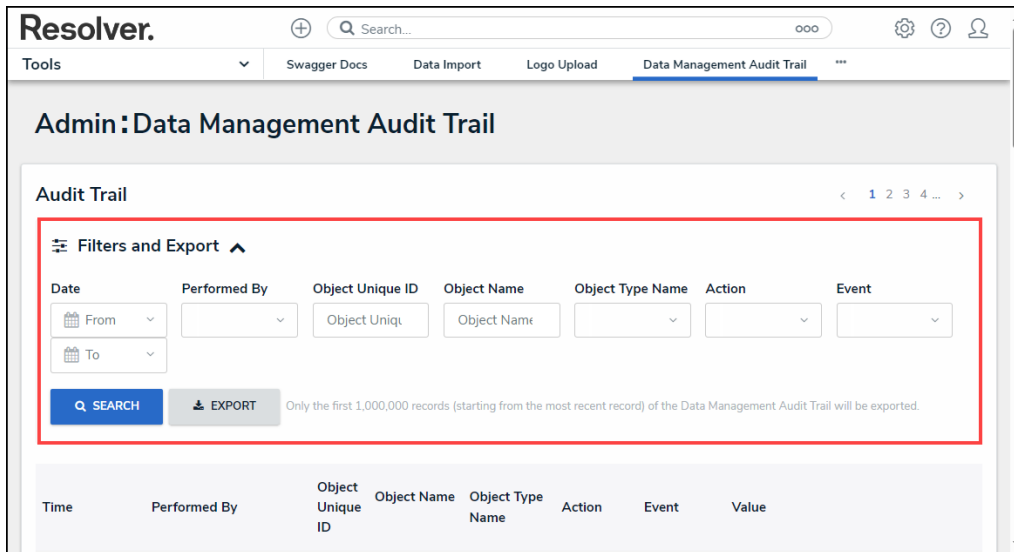


*Filter Fields*

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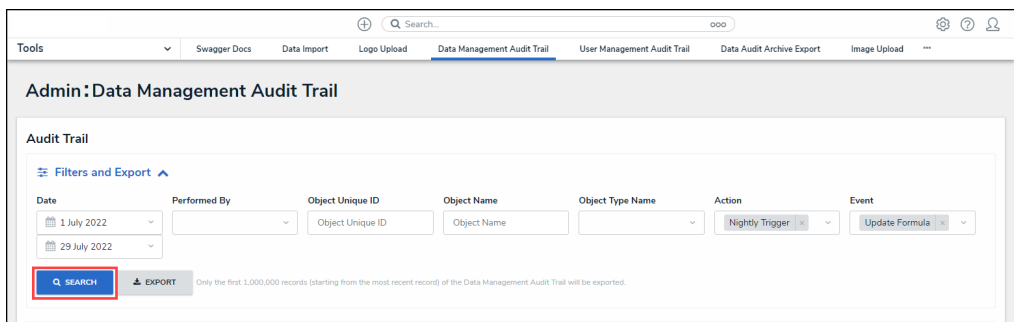


*Search Button*

> **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.
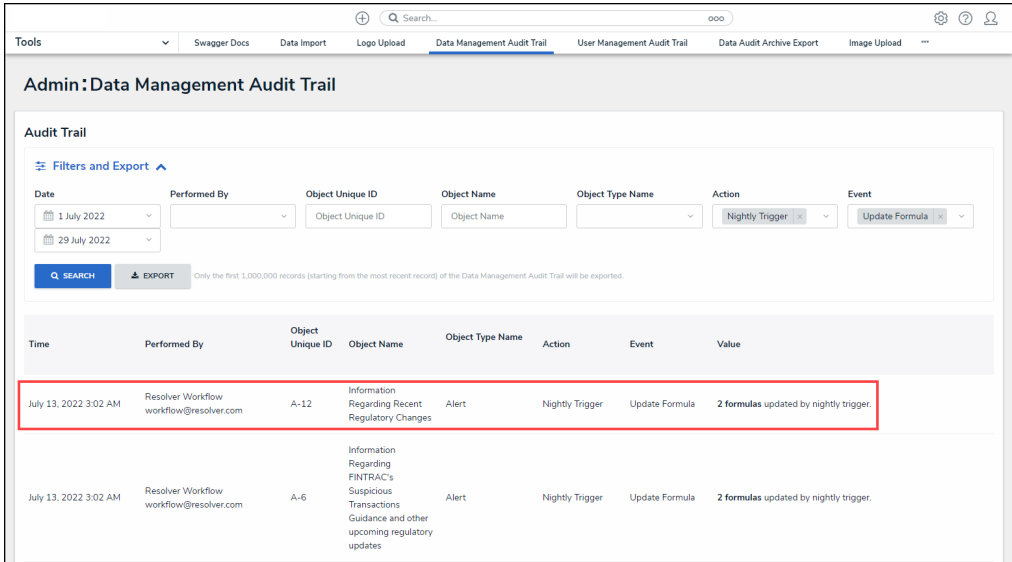
*Object Details Pop-up*

6. The following additional information is displayed on the ***Object Details*** pop-up:

    ○ **Object ID:** The **Object ID** is a numeric ID that the system automatically assigns to an Object when it is created.

    ○ **Object External Reference ID:** The **Object's External Reference ID** is an alpha-numeric ID that identifies the Object throughout the Organization.

    ○ **Object Type ID:** The **Object Type ID** is a numeric ID assigned by a User to identify Object Types throughout the Organization.

    ○ **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.
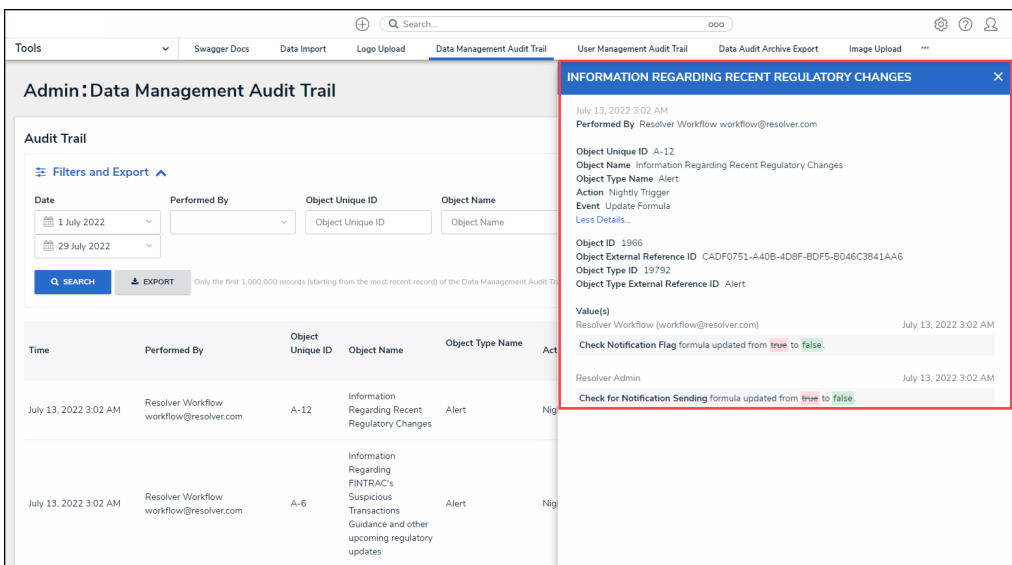


*Object Details Pop-up*

# >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 |
| | 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 |

| Action Name | Event Name |
| --- | --- |
| | 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 |
| Edit Object | Update Field |
| | 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 |
| Remove Relationship | Remove Relationship |
| | Update Formula |

| Action Name | Event Name |
| --- | --- |
| 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 |