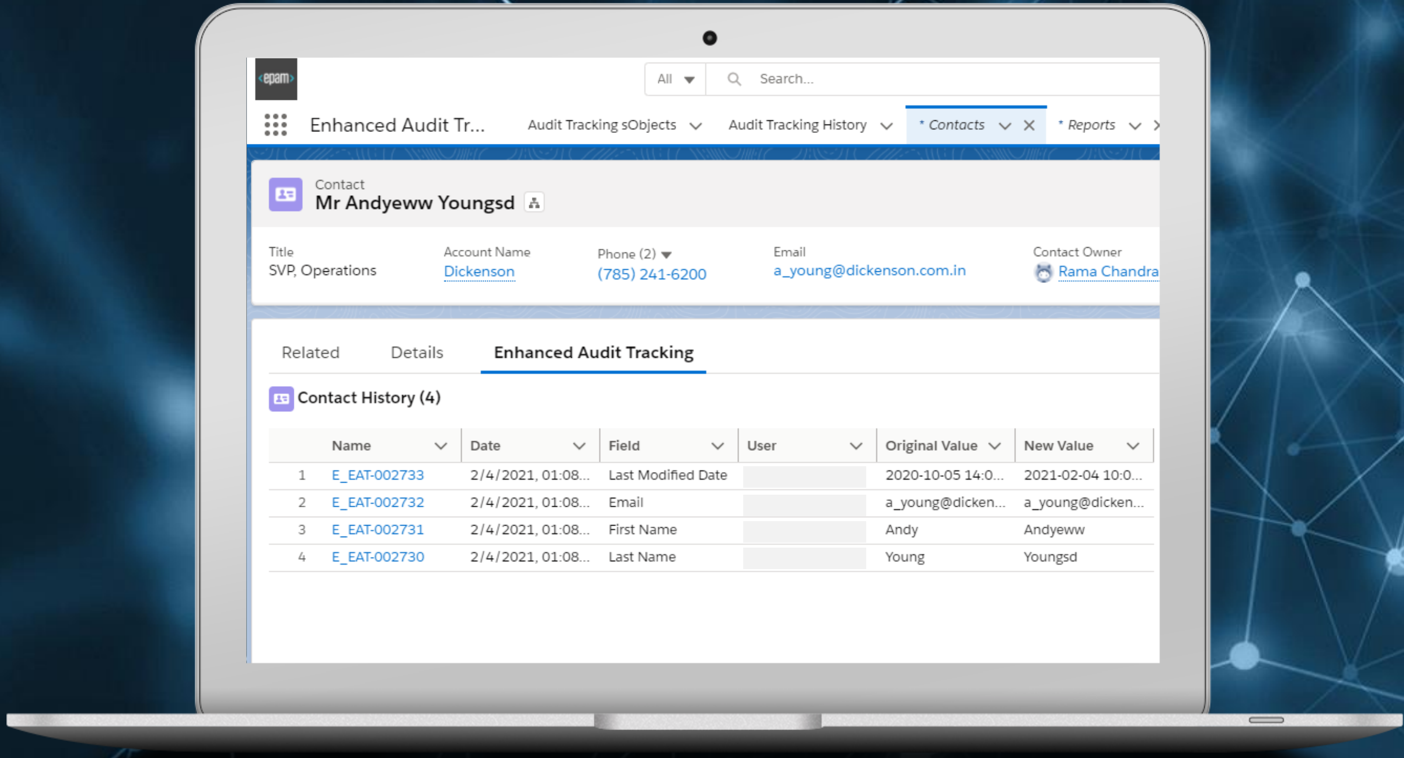
Enhanced Audit Tracking



User Guide

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Enhanced Audit Tracking Capabilities

ENHANCED AUDIT TRACKING CAPABILITES

1. Enables audit tracking for all data types incl. Multi-select, Long text data types, 'Expected Revenue' field on Opportunity, etc.
2. Helps to choose time frame for storing the data, identifies when the history data can be deleted
3. Gives an opportunity to build reports based on the available details
4. Enables configuration of the fields which need to be tracked
5. Makes audit tracking available both for standard and custom objects
6. Provides possibility to easily enable tracking using the mapping builder

Enabling the Enhanced Audit Tracking

1. Launch **Enhanced Audit Tracking** from App Launcher
2. Open **Audit Tracking sObjects**
3. Click **New** button
4. Enter the **sObject details** and the time frame to store the tracking data

API Name:

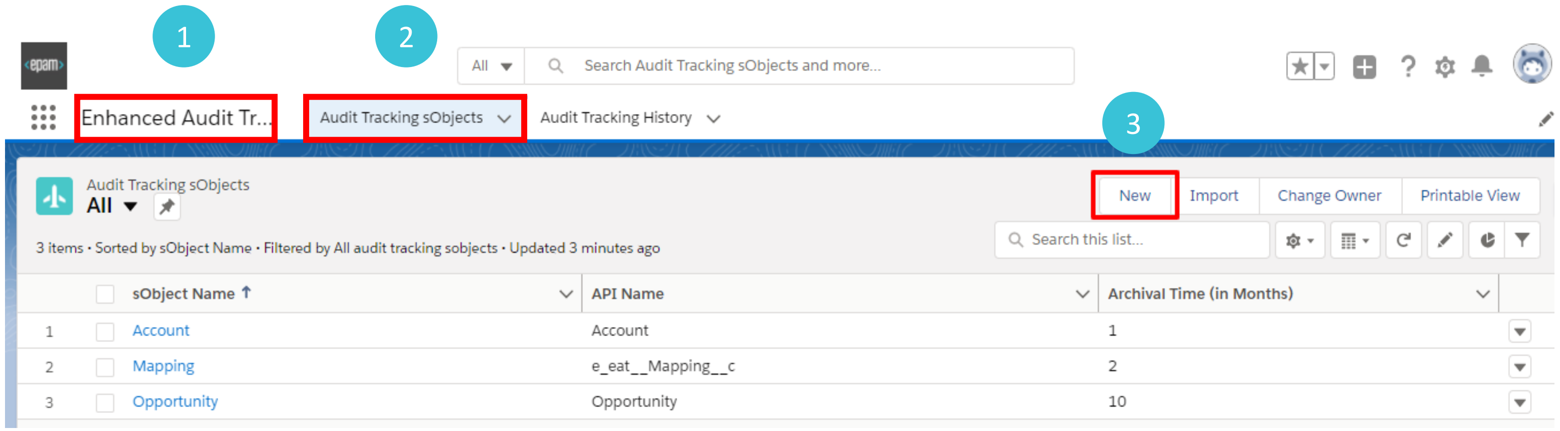
API Name of the sObject . If you do not know the sObject API name, please contact your System Administrator for help

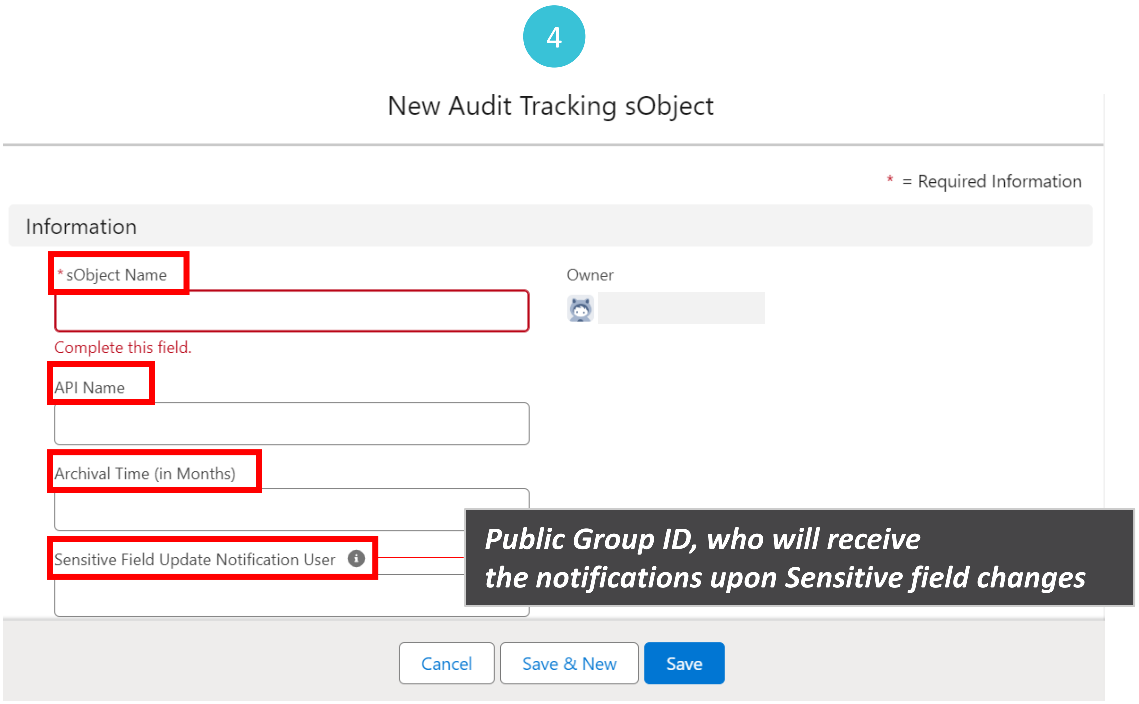
Note: It should match exactly with the sObject API Name, e.g. Account, Mapping__c, etc.

Archival Time (in Months):

Time frame to store the data in the org

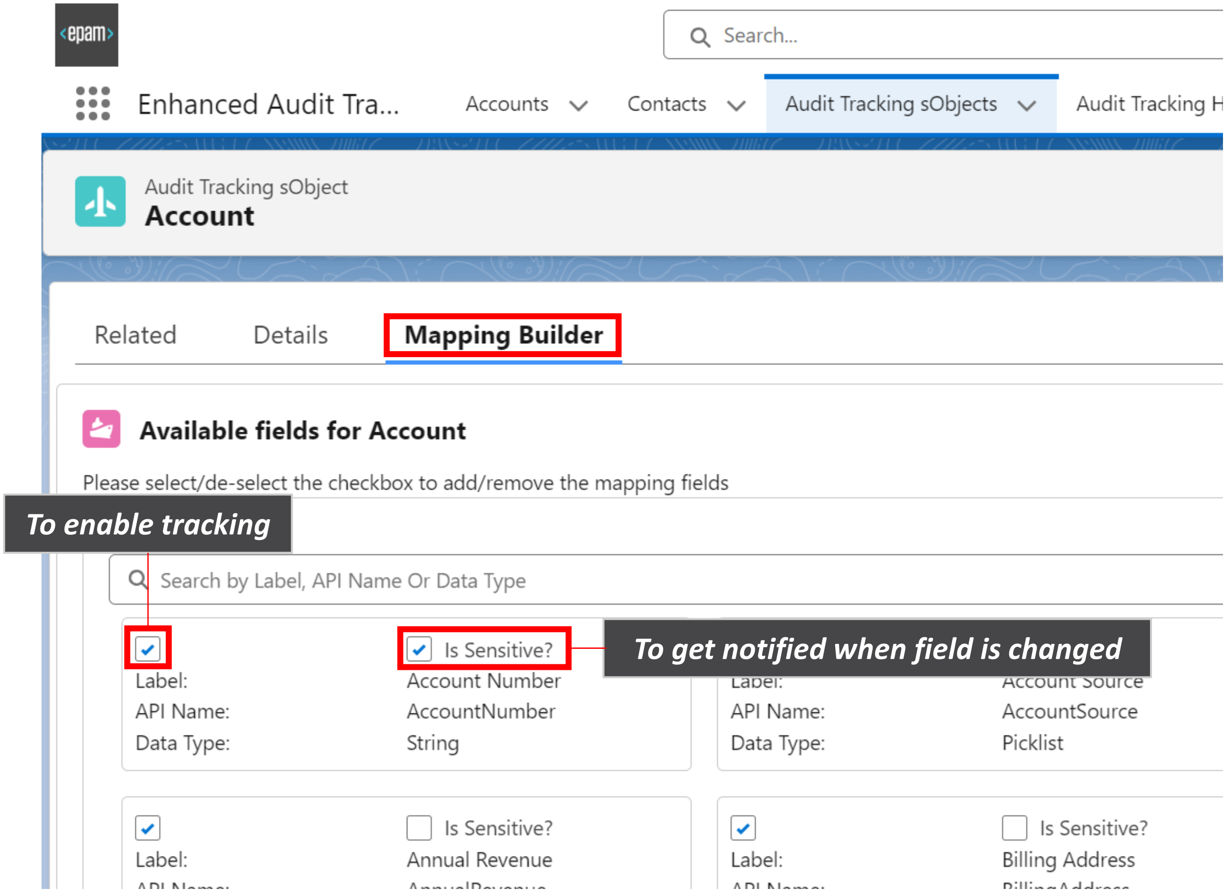
Note: Give the number in months, which specifies the archival time for the specific sObject





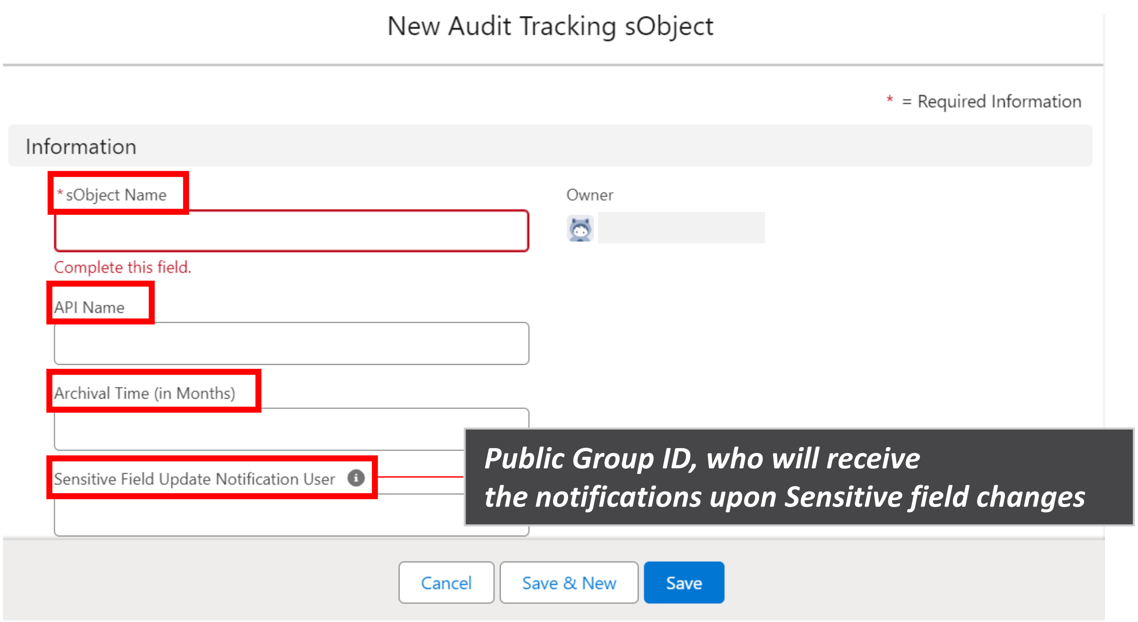
Mapping Builder

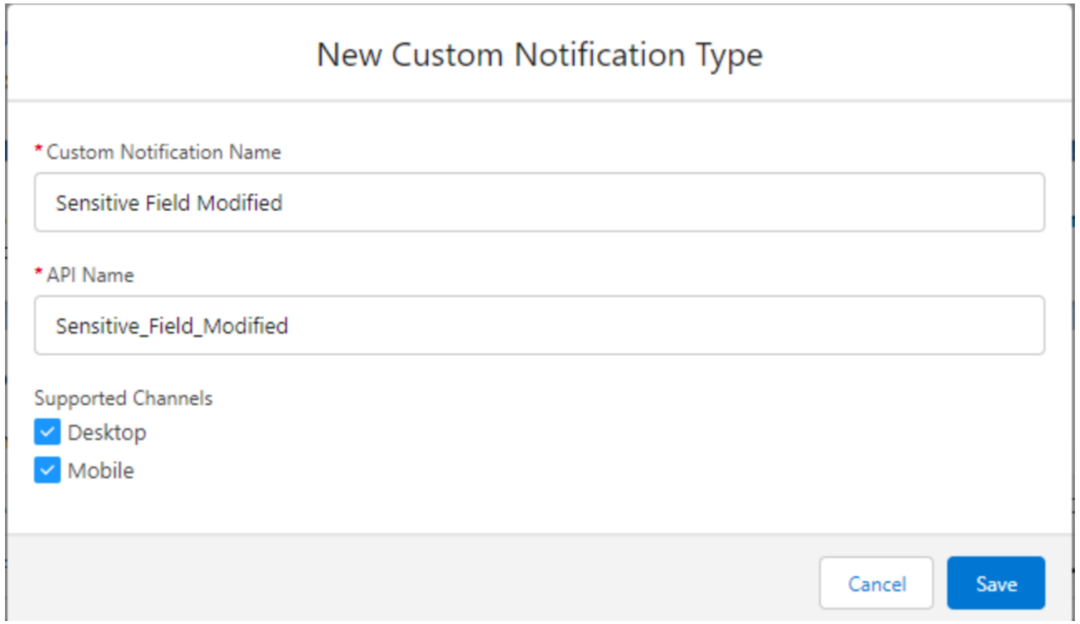
1. Click on **Mapping Builder** in Audit Tracking sObject to choose the fields that needs to be tracked
2. Search for the field which you wish to add to the template
3. Select the checkbox to enable the field for tracking. Uncheck the checkbox to disable the field tracking. Enabling or disabling will be automatically saved based on your selection
4. Now field tracking is enabled, and we need to add the page in the respective object to see the tracked history data



Manual Steps for Enabling Notifications

1. Create a Public Group with list of users who will receive the notifications and place the Id in ‘ Sensitive Field Update Notification User ’ field while enabling the tracking
2. Create a ‘Custom Notification’ record andmake sure that the API name is ‘Sensitive_Field_Modified’





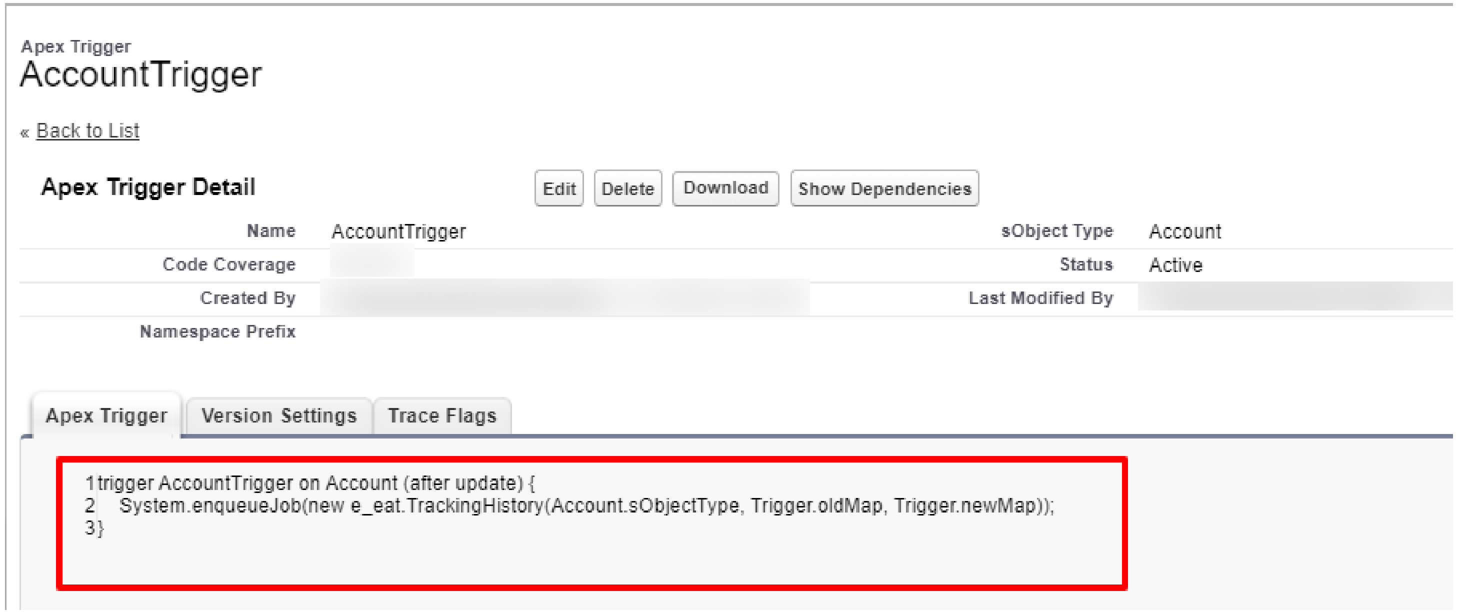
Enabling the logic in Trigger

1. Go to the respective object for which you have enabled the Audit tracking history
2. Create / Edit a trigger (after update event) for this object and include the below logic in the trigger:

```
System.enqueueJob(new
e_eat.TrackingHistory(Account.sObjectType,
Trigger.oldMap, Trigger.newMap));
```

Note: Here in place of Account, please replace it with the respective object's API Name

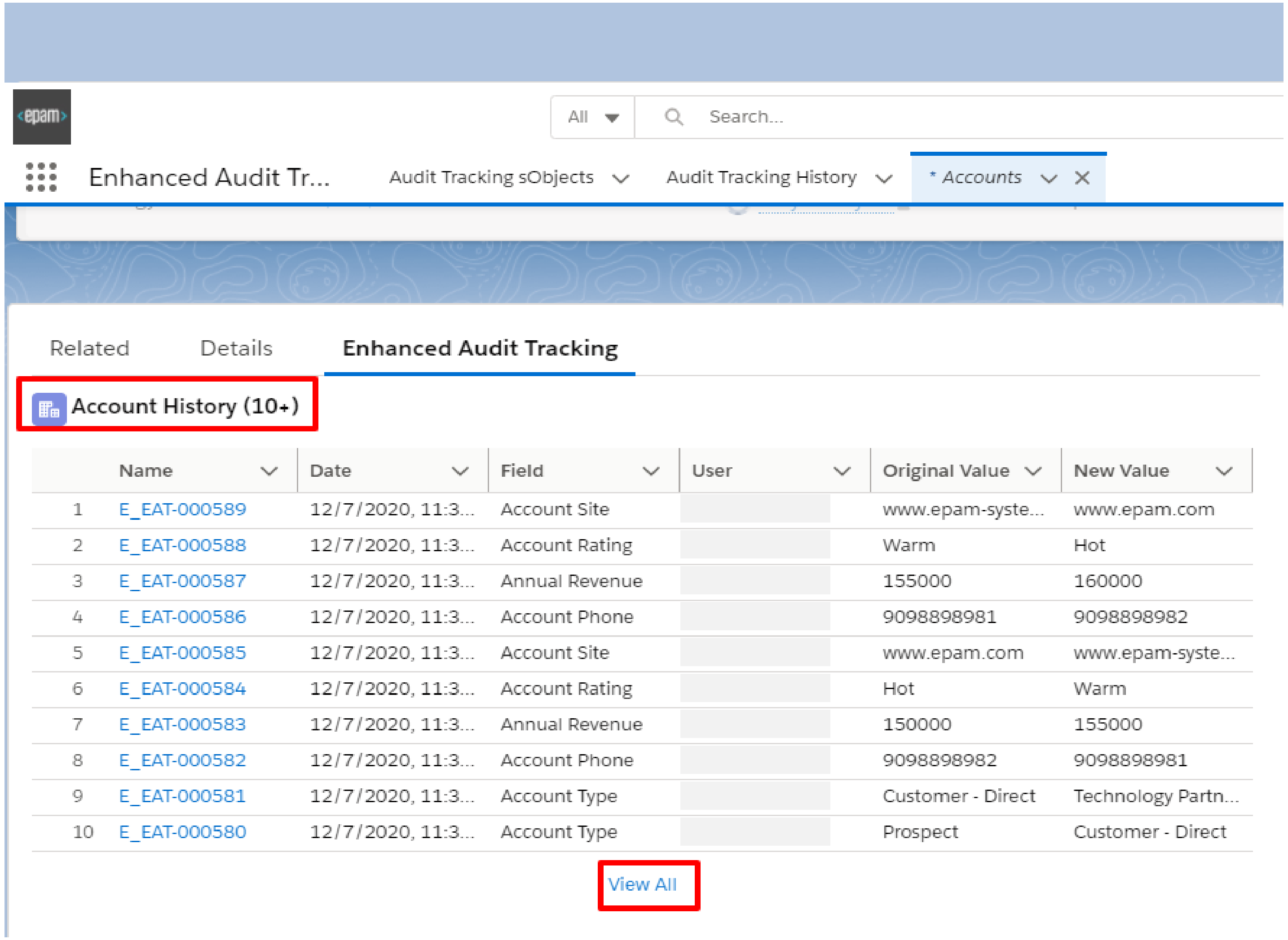
Note: Please have trigger logic in lower sandboxes with proper code coverage, as triggers require code coverage for deployment to Production. Consider to squeeze the specified trigger logic in the existing trigger (if the trigger already exists)



View Tracking History

Update the specific field (for which you have enabled the tracking) and then under 'Enhanced Audit Tracking' history page you will be able to see the changes.

- If there are more than 10 records in the history page, then you can click on 'View All' to see all the records
- You can sort the data on any column to sort the data



	Name	Date	Field	User	Original Value	New Value
1	E_EAT-000589	12/7/2020, 11:3...	Account Site		www.epam-syste...	www.epam.com
2	E_EAT-000588	12/7/2020, 11:3...	Account Rating		Warm	Hot
3	E_EAT-000587	12/7/2020, 11:3...	Annual Revenue		155000	160000
4	E_EAT-000586	12/7/2020, 11:3...	Account Phone		9098898981	9098898982
5	E_EAT-000585	12/7/2020, 11:3...	Account Site		www.epam.com	www.epam-syste...
6	E_EAT-000584	12/7/2020, 11:3...	Account Rating		Hot	Warm
7	E_EAT-000583	12/7/2020, 11:3...	Annual Revenue		150000	155000
8	E_EAT-000582	12/7/2020, 11:3...	Account Phone		9098898982	9098898981
9	E_EAT-000581	12/7/2020, 11:3...	Account Type		Customer - Direct	Technology Partn...
10	E_EAT-000580	12/7/2020, 11:3...	Account Type		Prospect	Customer - Direct

Thank you!

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