SWS - Forms in the Maintenance Menu - Audit Trail

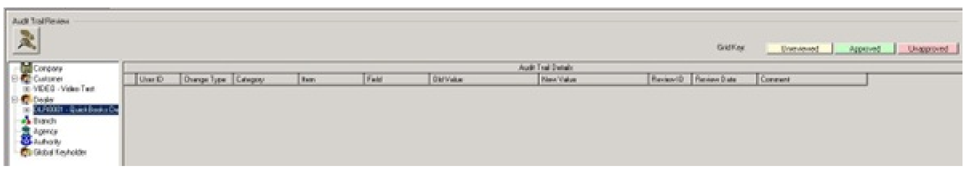
The Audit Trail keeps a detailed log of all data entry changes made in Manitou. A Supervisor can access and track user changes by accessing the Audit Trail form.

Accessing Audit Trail Records on the Audit Trail Form

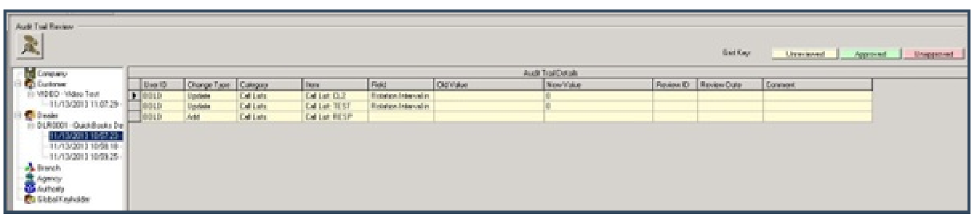
Perform the following steps to access the Audit Trail form:

1. Navigate to the Maintenance menu and click "Audit Trail".

   Result: The Audit Trail form displays as shown in the screenshot below:

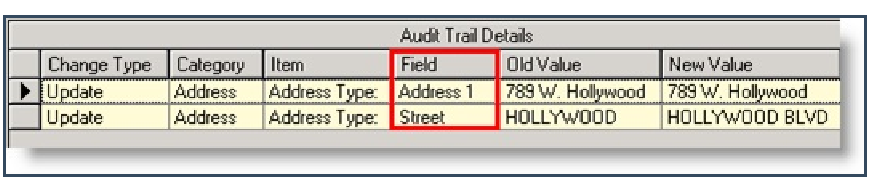
2. Expand entries in the Navigation Tree to access specific Audit Trail records as shown in the following screenshot:

   Result: The Audit Trail record displays.

Field Descriptions for the Audit Trail Form:

- User ID – This column contains the Manitou User ID of the person who edited the account.
- Change Type – This column describes the type of change made to the account.
- Category – This column indicates the type of form that was added, changed, or deleted.
- Item – This column shows the specific account or Entity added, changed, or deleted.
- Field – This column shows the specific field added, changed, or deleted. The following screenshot shows the Customer's address, and even more specifically, that his street listing was changed in Manitou:



Audit Trail Details

Change Type	Category	Item	Field	Old Value	New Value
Update	Address	Address Type:	Address 1	789 W. Hollywood	789 W. Hollywood
Update	Address	Address Type:	Street	HOLLYWOOD	HOLLYWOOD BLVD

- Old Value and New Value – these two columns display the data contained in the field prior to a change, and the data as it displays following an update.
- Review ID and Review Date – these two columns show the date that changes were reviewed and the ID of the

person who authorized the change.

- Comment – this column displays any extra information provided by the authorizing person regarding the changed account.

  Note: The status of system changes is indicated by the color in which the log line displays. Yellow indicates an unreviewed change, and green indicates an approved change. Red indicates a change that was reviewed, but not approved. Please note, however, that a rejection does not automatically undo a change. To undo a change, you must manually return to the account and reverse any changes made.

Reviewing Changes in Manitou

An SWS user with proper access can log into Manitou and review changes made by other Manitou users.

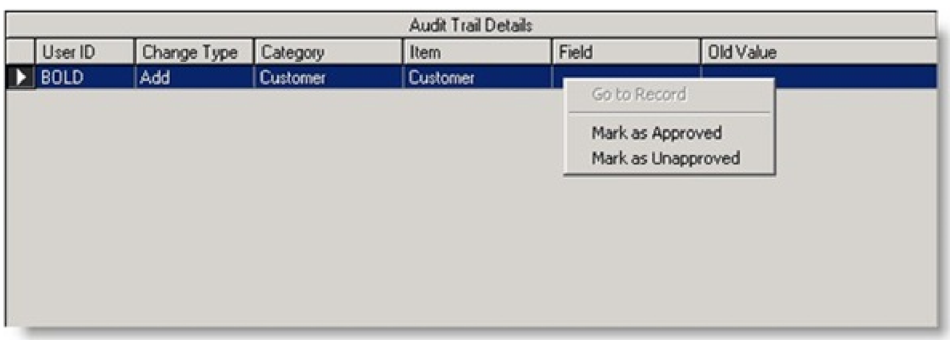
Perform the following steps to review changes made in Manitou:

1. Navigate to the Maintenance menu and click "Audit Trail".

   Result: The Audit Trail form displays.

2. From the "Audit Trail Review" Navigation Tree, select the Entity for whom you want to review changes.

   Result: Changes made for the Entity display on the "Audit Trail Details" window as shown in the following screenshot:

3. Select the log line for the change you want to review, and right-click it.

   Result: A window displays as shown in the following screenshot:

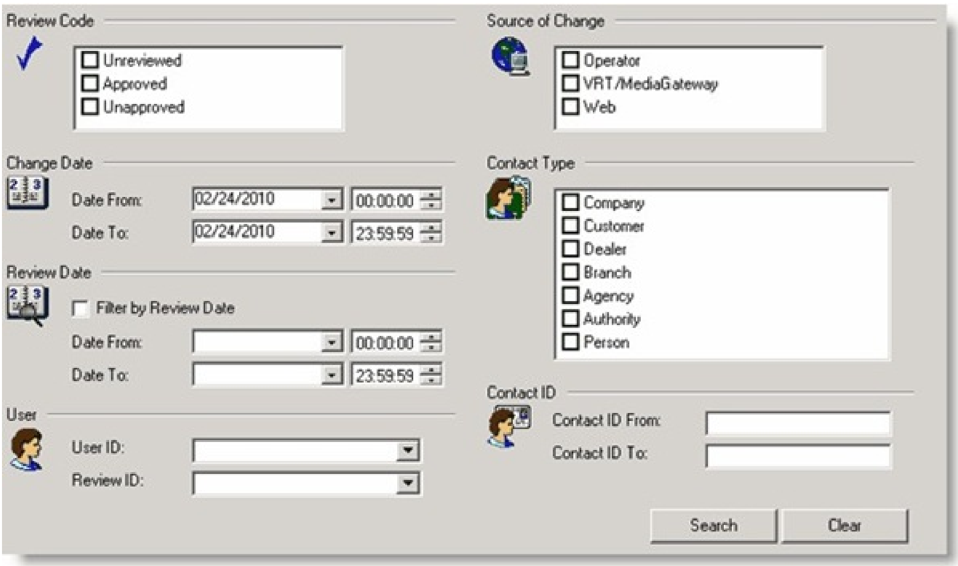
4. Select "Mark as Approved" or "Mark as Unapproved".

   Result: Your changes are now displayed in the last three columns of the log line.

   Note: You only have one opportunity to mark an item as approved or unapproved. Marking an item as unapproved does not change the data back to its original form. You must return and manually reverse any changes made.

Using the Audit Trail Search Filter

The Audit Trail search form is similar to other search forms in the SWS. Users can filter out searches by Review Code, the source of the change (such as an Operator or the Manitou User ID), the date of the change, the contact or contact type, or the date of the change or review.



Note: Users can only select dates in the Filter by the Review Date fields if the "Filter by Review Date" checkbox is selected.

Once you have set search parameters, click "Search". The search results are displayed in the main Audit Trail review form.