

SWS - Forms in the Report Menu - System Reports - Maintenance Reports - Audit Trail

Last Modified on 08/02/2024 11:37 am EDT

Perform the following steps to generate an Audit Trail Report:

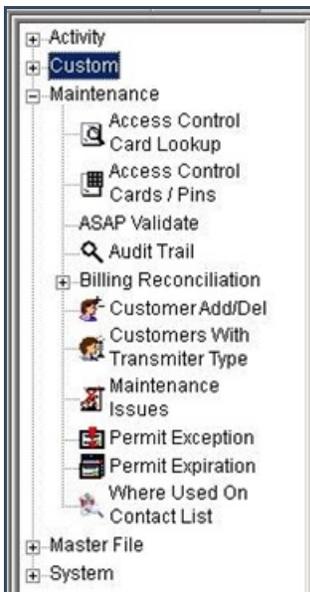
1. Navigate to the Reports menu, and select "System Reports".

Result: The "System Reports" Navigation Tree displays as shown in the following screenshot:



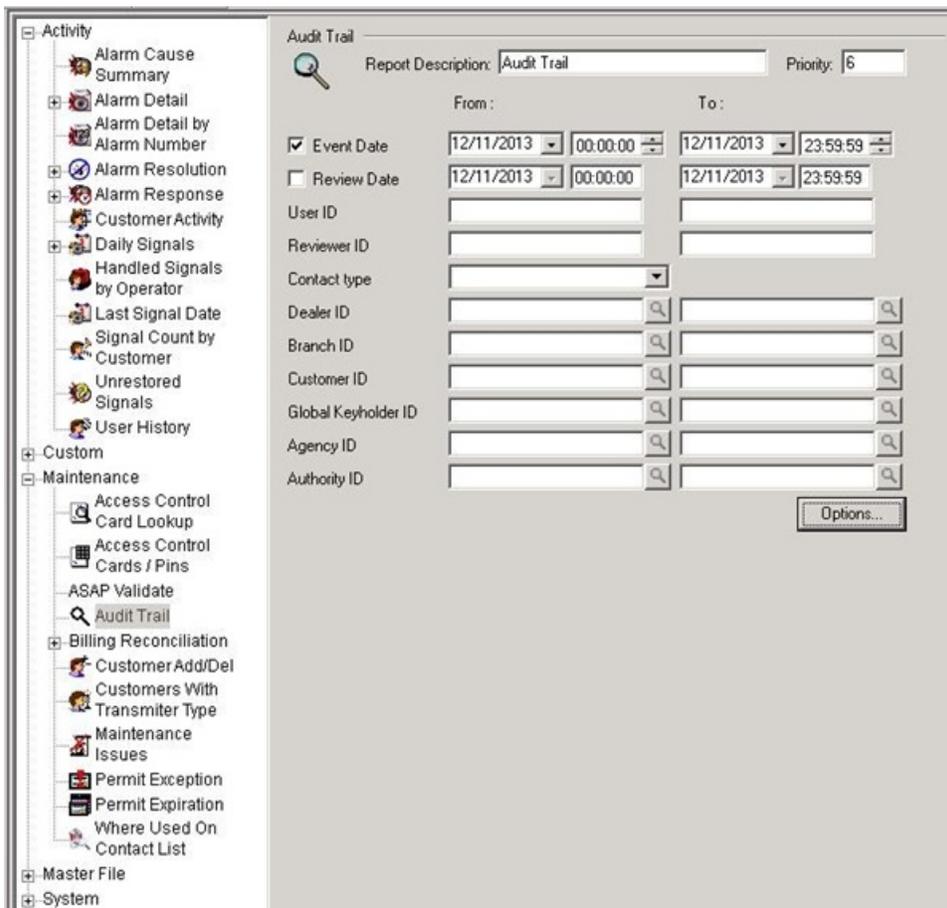
2. Click the "Maintenance" Navigation Tree Node.

Result: The Maintenance section of the Navigation Tree expands as displayed in the following screenshot:



3. Double-click "Audit Trail".

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



4. If you want, apply any of the following parameters to your Audit Trail Report:

- User ID
- Reviewer ID
- Contact Type
- Dealer ID
- Branch ID
- Customer ID
- Global Keyholder ID
- Agency ID
- Authority ID

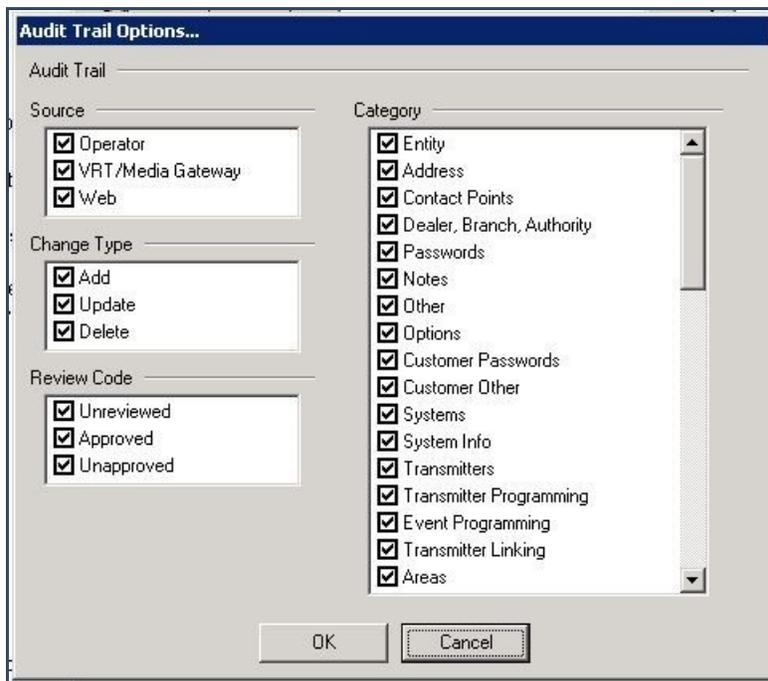
5. To run an Audit Trail Report, enter a beginning value in the "From:" field and an ending value in the "To:" field. The system will report on all items in the selected category that fit between the beginning and ending values.

6. The "Event Date" option displays as preselected. Enter an Event date and time range for the Event in the "To:" and "From:" fields.

7. If you want, select the "Review Date" checkbox and enter a Review Date and time range in the "To:" and "From:" fields.

8. Click "Options".

Result: The "Audit Trail Options..." window displays as shown in the following screenshot:



9. Deselect items in the "Source", "Change Type", "Review Code", and "Category" areas of the window that you want to exclude from your Audit Trail Options Report, and click "OK".

Result: The Audit Trail Options window closes, and the system returns you to the Audit Trail form.

10. Once you have entered all the parameters for your Report, click "Next".

Result: The Distribution Tab displays as shown in the following screenshot:\

Override or unlisted destination:

Override recipient's name:

Override destination type:

Override destination address (Fax/Email):

Contact list destination:

Default printer:

Contact list type:

Customer:

Show suppressed contacts Hold for preview

Contacts

- Anytime Bill
- Mary Beth
- Pete - Non Opening user
- Same Spade
- John Doe
- Jg
- Jeff Herd
- Non Rotating user 1
- Non Rotating user #2
- Jane Doe
- 11
- 12
- 13
- 14
- 15
- 16
- 17
- 18
- 19
- 20
- 21

Dealer

- Dealer GH 202 for testing

Branch

Agency

Authority

Customer

- George's testing account
- Company (printer only)

Reports Distribution

11. For instructions on distributing your Report, refer to the "System Reports" document.