Audit Module
UX User Guide

infor Pathway

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1. Glossary of Terms

Term	Explanation
ION	An Interoperability and business process management platform designed to integrate applications, people, processes and data to run a business.
Preconfigured Pathway	The default Pathway setup provided to new customers.

2. Overview

The Auditing system provides the facility for recording changes made to the database. Auditing can be performed on most of the database entities and on selected models (modules) looking for specific change types e.g. new records, rather than changes.

Auditing can be set up in Audit Model Maintenance before turning it on under System Administration Menu Option, then selecting System Parameters, Application Code Maintenance and making Auditing active.

RECOMMENDATION: Auditing adds data to the database and can impact Pathway performance.
Ensure auditing is targeted to:

- record information that is required to solve issues when they arise, or
- to understand when a record was updated, updated from what to what and by whom.

NOTE: Once an Entity is selected, the entire Entity is audited.

The audit function consists of three separate functions:

- Audit log
  A record is created in the audit log every time a change is written to the database i.e. when a record is created, updated or deleted. Audit log records are only created where the models, entities and fields are marked for auditing. For each change, the audit log will record who made the change, the date and time of the change, what change was made and which form was used to make the change.
- Reporting
  There are two types of reporting:
  - an Audit Report (extract) for all/create/update/delete actions or all/selected entities within a given date range.
  - ability to display audit information (using pull-down menus) on any form for the current entity.
- Cleanup
  The audit cleanup removes all/selected entity audit records before a certain date. The creation and last update records can be excluded from deletion. A report can be produced for all records that have been deleted.

For further assistance setting up Auditing please contact your Account Manager.

3. What Should be Audited?

The purpose of the Audit System is to record every single database update performed to every single database table providing disk space is not a problem.

It is usual practice for the Name and Address Register module and Property Administration module to have auditing turned on for many entities and fields. This is because Names, Addresses and Properties are base records that many other Pathway entities link to.

Modifications on static entities i.e. entities that are not modified during normal daily operations can be audited as well as modifications to entities that are considered critical.

- Parameters are entities that are modified outside normal daily operations.
- Master files such as Names, Addresses, Properties, Titles, Parcels, Assessments, Infringements and Animals may be modified during normal daily operations.
- Audit collection for transaction Entities is not recommended due the large volume of changes. Where an Entity must be audited and there are transaction fields within that Entity, keep a close eye on the amount of audit data being created and your database size.
- Volatile entities that contain no meaningful data should not be audited e.g. next number and look ups.

RECOMMENDATION:

1. Do not audit Name and Address Parameters as a parameter change is likely to report on many names.
2. Do not audit Property Parameters as a parameter change is likely to report on many properties, titles and parcels.

Auditing examples:

1. If a parameter is only changed once a year, should it be audited?
   You may decide:

a. Not to audit it because the record is double checked when the change is made e.g. Rates Accounting >> Parameters >> Rating Period Maintenance.
b. To audit because the change isn't always made at the same time of year and you want to record changes inside Pathway.

2. A mistake is constantly being made when staff lodge planning applications. Auditing is turned on under Auditing >> Audit Model Maintenance for the Module LAP Applications, Entity LAPAPPL Application, Image 1.

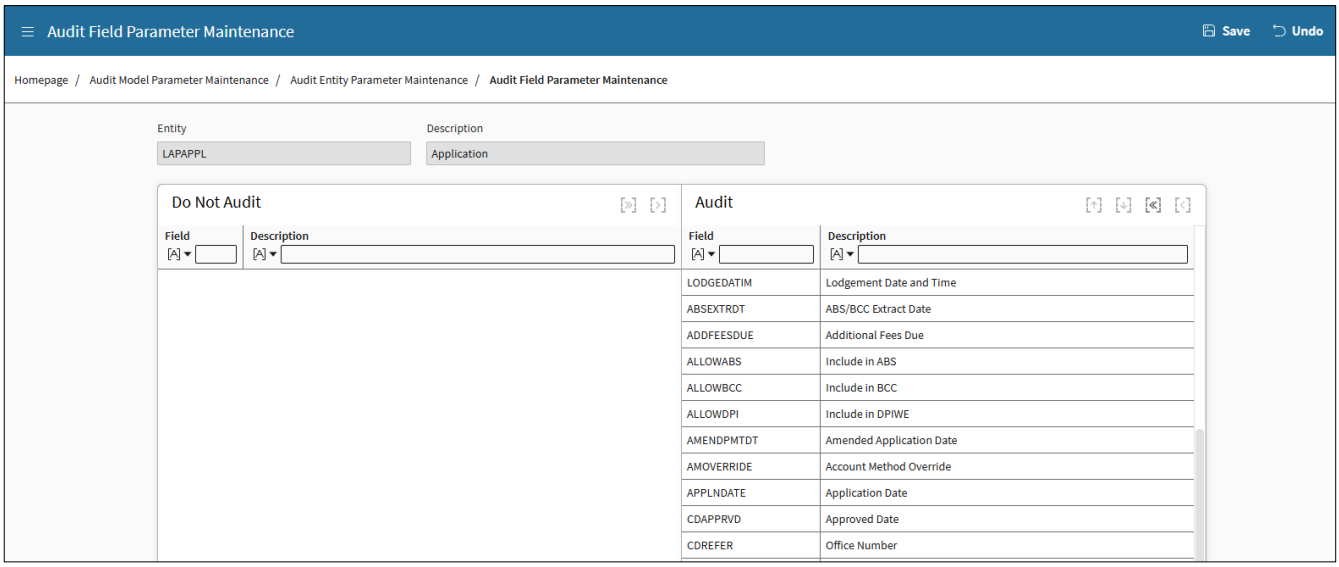

Image 1

3. Someone is creating Animal records without entering the Animal Name and Date of Birth. Turn auditing on for Module LAN Animal Control and Entity LANANML Animal.

   Image 2 shows the Animal Reference 5078, so it is easy to find that Animal record in Pathway. The audit shows that nothing has been entered into the Animal Name and that RASHY was the User Account that created the Animal but missed the Animal Name.

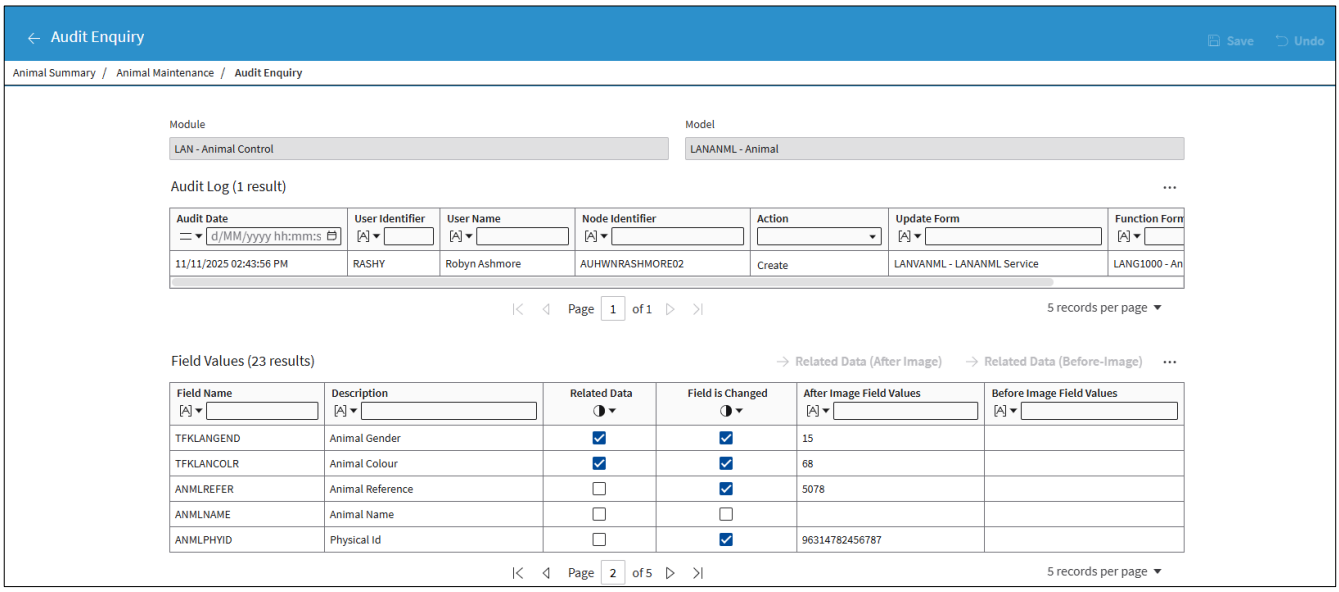

Image 2

4. Finding the Pathway Entity and Fields

Field Properties are available on most data entry fields in Pathway under the options menu.

Example: Finding the entity and fields for the Animal Name and Date of Birth:

1. Go to Animal Registration >> Animal Maintenance.
2. Open an Animal record and go to Animal Maintenance.
3. Click into the Name field and then options – Field Properties, Image 3.
4. Repeat for Date of Birth, just to make sure it is in the same Entity.

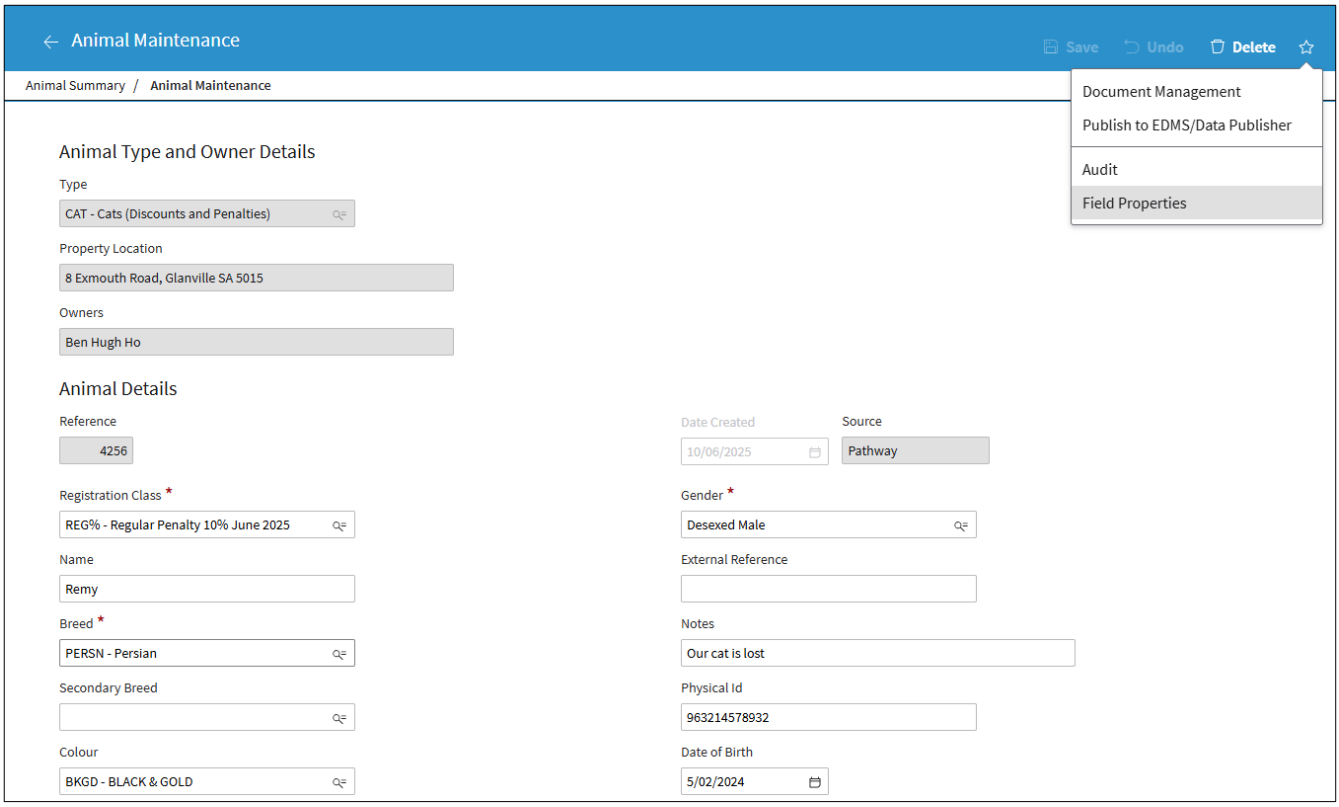

Image 3

5. The Field Properties show the Entity is lananml, Images 4 and 5.

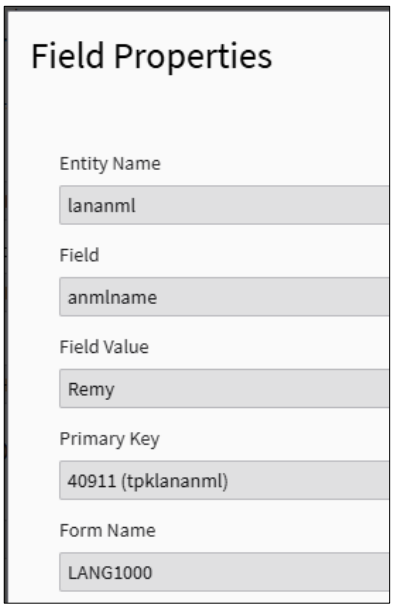

Image 4

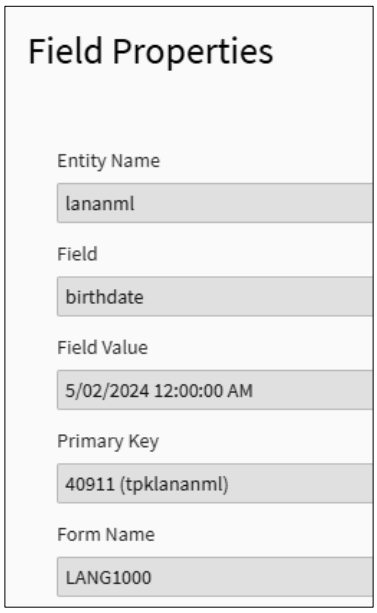

Image 5

5. Turning Auditing on and off

The Auditing module can be turned off under System Administration >> System Parameters >> Application Code Maintenance, Image 6.

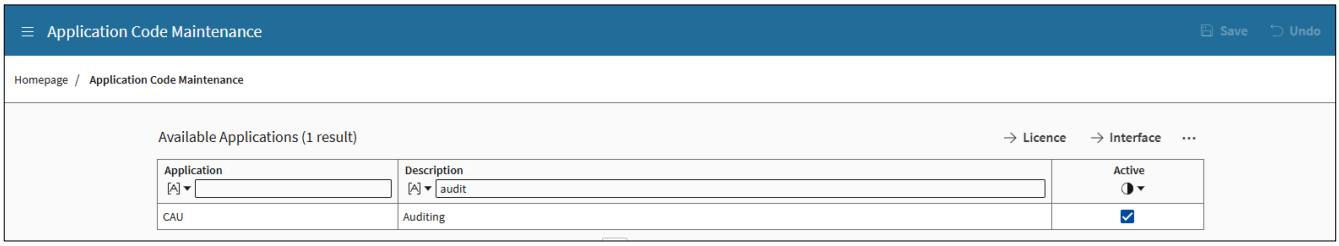

Image 6

The module, entity and field auditing options can be set while the Auditing module is inactive under System Administration >> System Parameters >> Application Code Maintenance.

When auditing is activated on a model, then all entities and fields within the model are automatically activated.

To set up Auditing:
1. Determine the models (modules) that need to be audited.
2. Determine the entities that do not need to be audited within each model.
3. Activate Auditing under System Administration >> System Parameters >> Application Code Maintenance.

NOTE: Models and entities can go live one at a time.

Over time, review the Audit reports to determine if models and entities can be omitted as they are no longer required or to reduce the data being recorded or the physical size of the audit report.

When a Pathway test environment is refreshed with data from the Pathway production environment, it is usual for Auditing to be turned off in the Pathway test environment in Application Code Maintenance.

When the Rates Generation is run in Update mode, Auditing is usually turned off under Application Code Maintenance while the process is running. The Rates Generation runs much faster when it doesn't have to record the audit information for every rate transaction generated on every rate assessment.

Turning Auditing off in Application Code Maintenance means the models and entities under Auditing >> Audit Model Maintenance are not altered and it's easy to turn Auditing on again when the generation is completed.

6. Audit Model Parameter Maintenance

The parameters which control the Auditing establish which models and entities are to be included or excluded from the auditing process. The establishment of these parameters is required prior to running any audit reports.

Image 7 shows the modules that have been assigned to be audited.

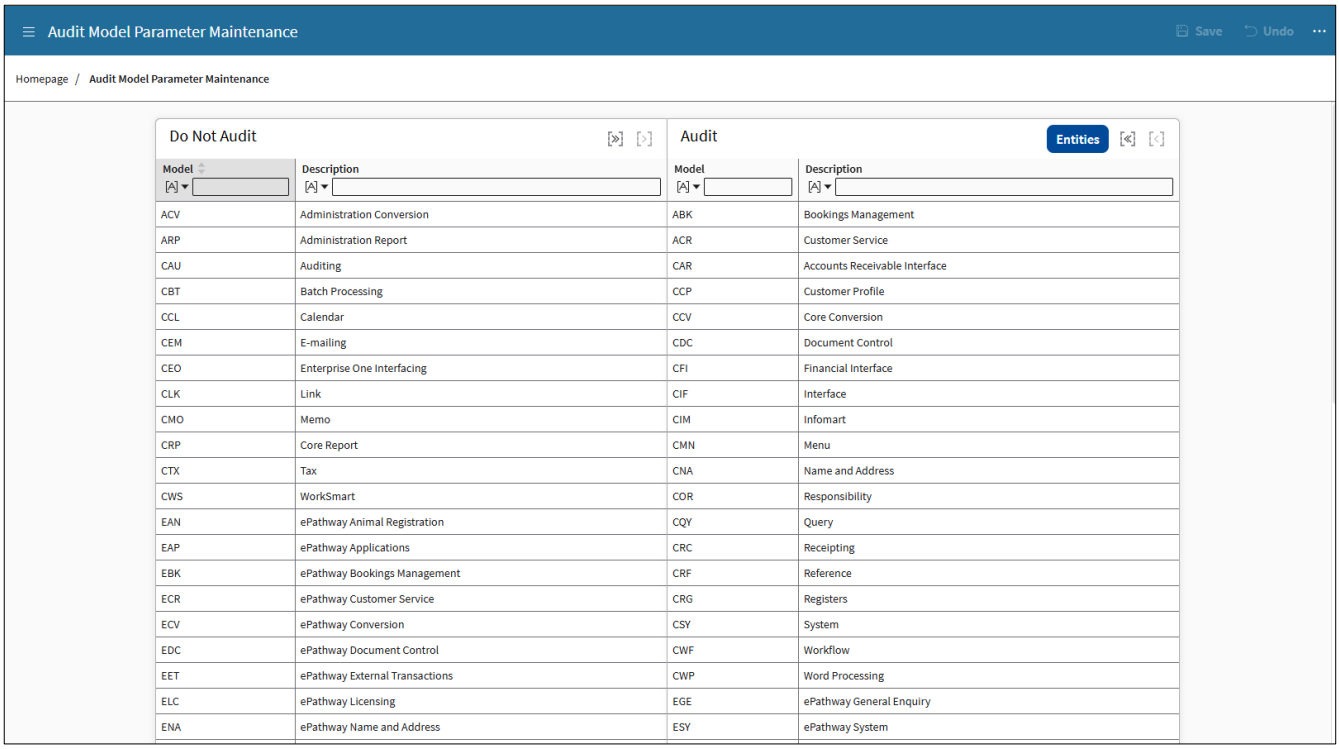

Image 7

Click on the module being setup and the Entities button. Image 8 shows ACR Customer Service is the model selected.

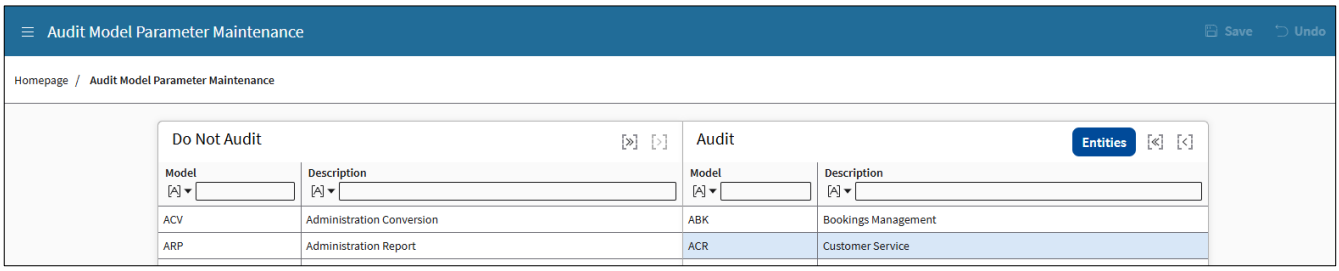

Image 8

Image 9 shows the Entities assigned to be audited for ACR Customer Service.
Click on Fields to view the fields being audited, Image 10.

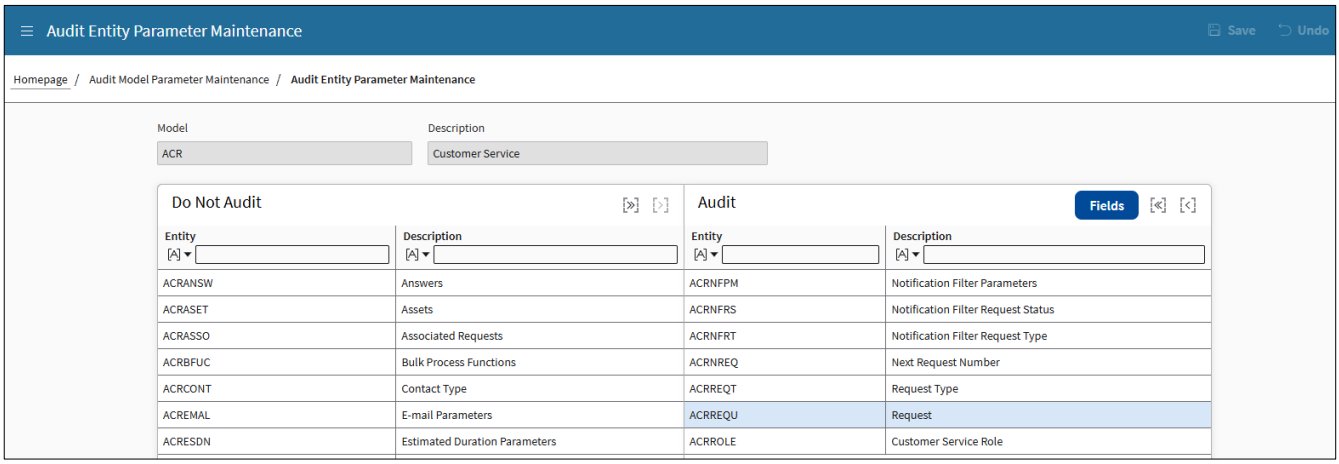

Image 9

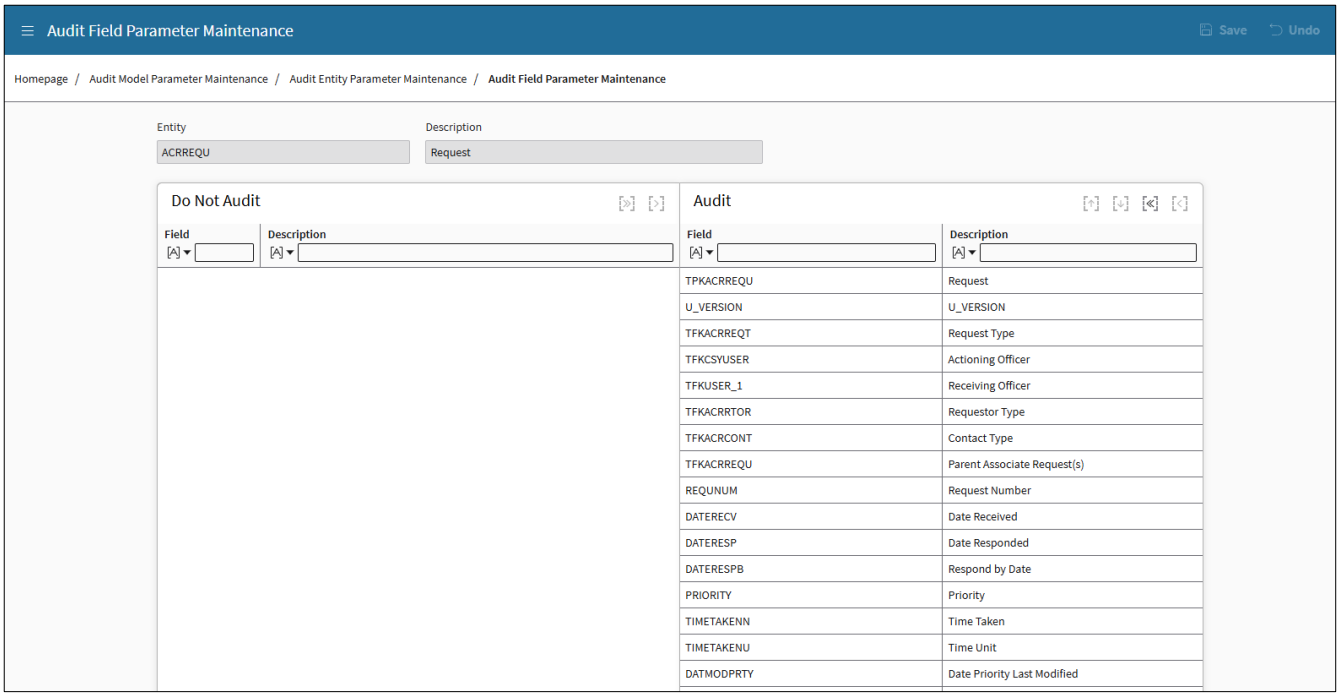

Image 10

Image 10 shows that all fields are assigned for auditing.

WARNING: De-assigning a field does not stop the field from being audited.

6.1 Fields

Entity
The code of the database table.

Description
The description of the database table.

Do Not Audit
Contains the model names and descriptions which are not included in the auditing process.

Audit
Contains the module code and description, entity code and description or field code and description which are to be included in the auditing process.

Assign and Deassign
These buttons assign or de-assign individual module or entity or all models or entities for auditing.

Select Button
This button allows the selection of individual entities for auditing.

Remove Button
This button allows the selection of individual entities for removal from the auditing process.

Remove All Button
This button allows the selection of all entities for removal from the auditing process.

7. Audit Set Maintenance

The Audit Set Maintenance menu is used to define what database modifications to Name and Address or Bookings tables are to be reported.

To define an Audit Set for Name and Address, the all the Name and Address Entities need to be audited.

To ensure this Entity is being audited:

1. Go to menu Auditing >> Audit Model Maintenance.
2. Ensure that the CNA Name and Address Model has been selected, then click on Entities, Image 11.

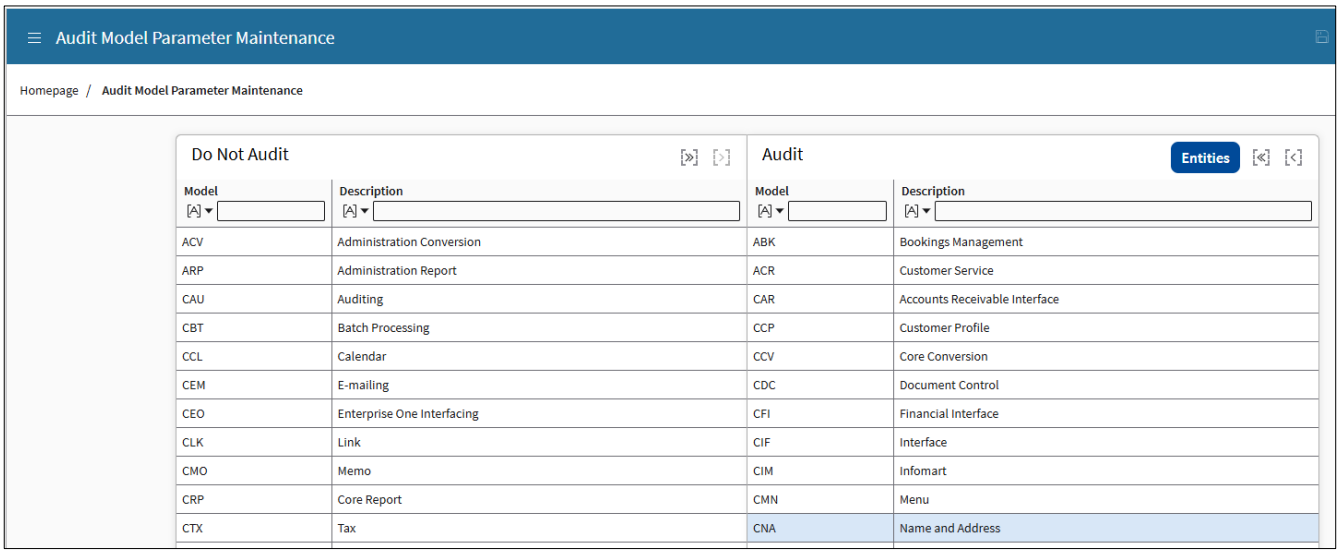

Image 11

3. All Entities must be assigned under Audit, Image 12.

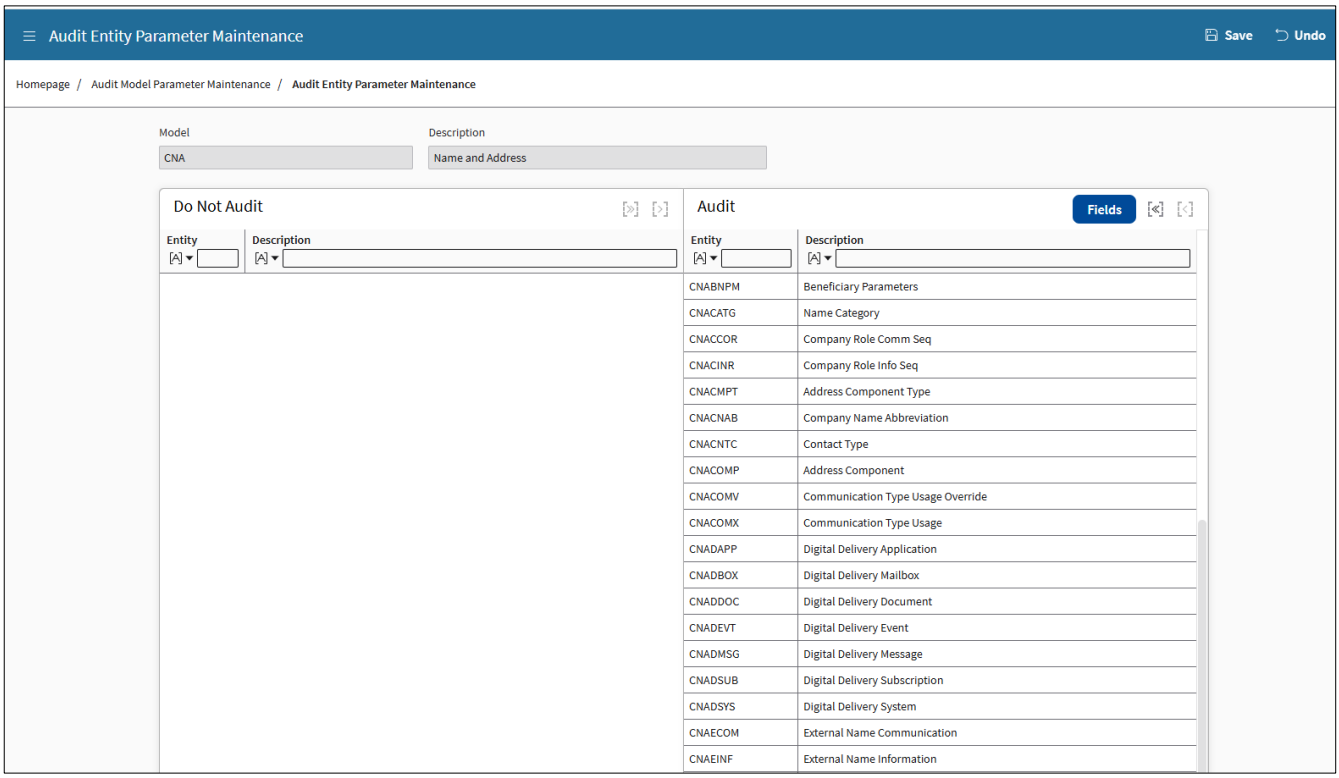

Image 12

NOTE: Refer to full details for setup outlined under Audit Set Report (21)

7.1 Audit Set Maintenance

Audit Set Maintenance enables the setup of new Audit Sets, Image 13.

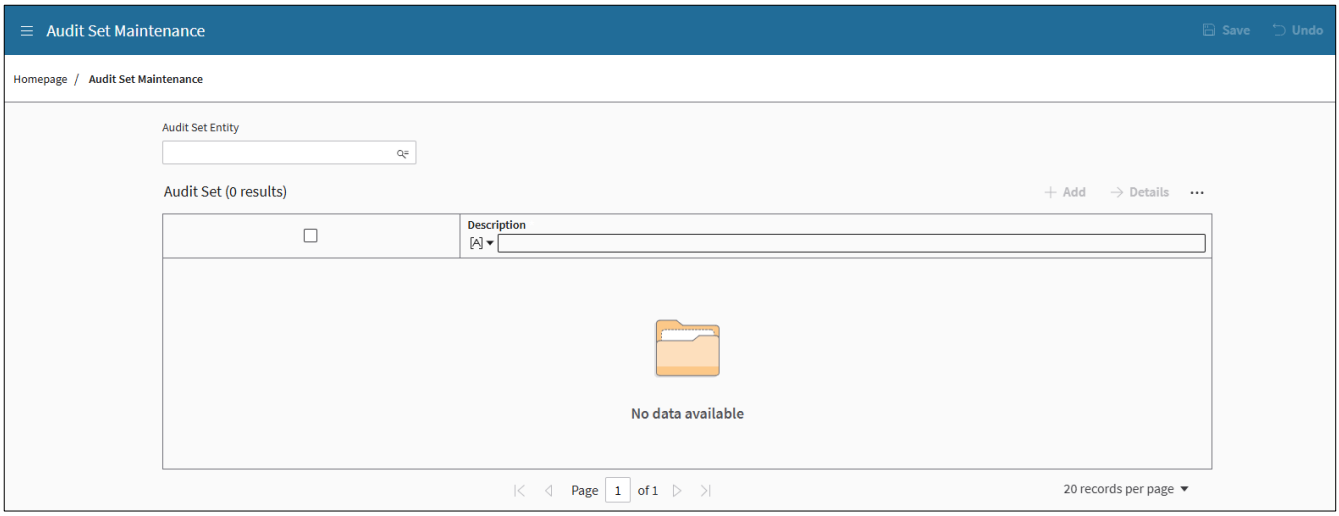

Image 13

Entity
The CNAIDTY and ABKRQHD entities will display in the Audit Set Entity field.
Select CNAIDTY and the Audit Sets are created, Image 14.

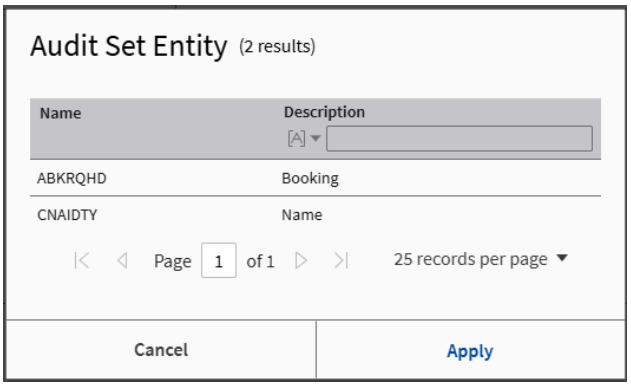

Image 14

NOTE: you will need to select CNAIDTY each time you open Audit Set Maintenance.

This field displays the name of any Audit Sets that have been created, Image 15.

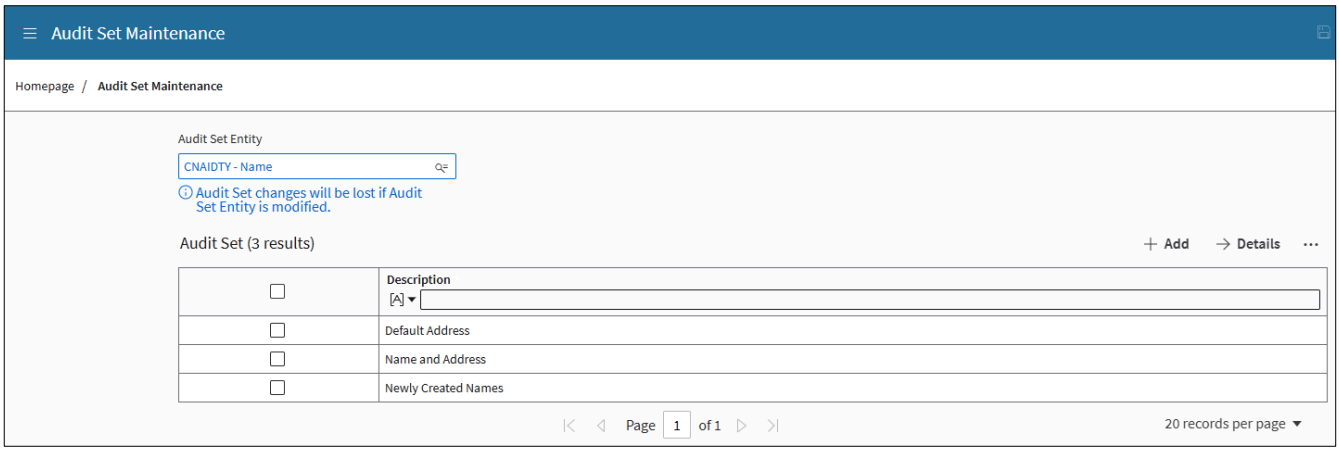

Image 15

Click on the Audit Set you want to set up the parameters for, then the Details button. You will now be setting up parameters for the Audit Set i.e. to define what modifications are to be included in the Audit Set Report, Image 16.

7.2 Default Address

The left side displays a contracted tree structure, Image 16.

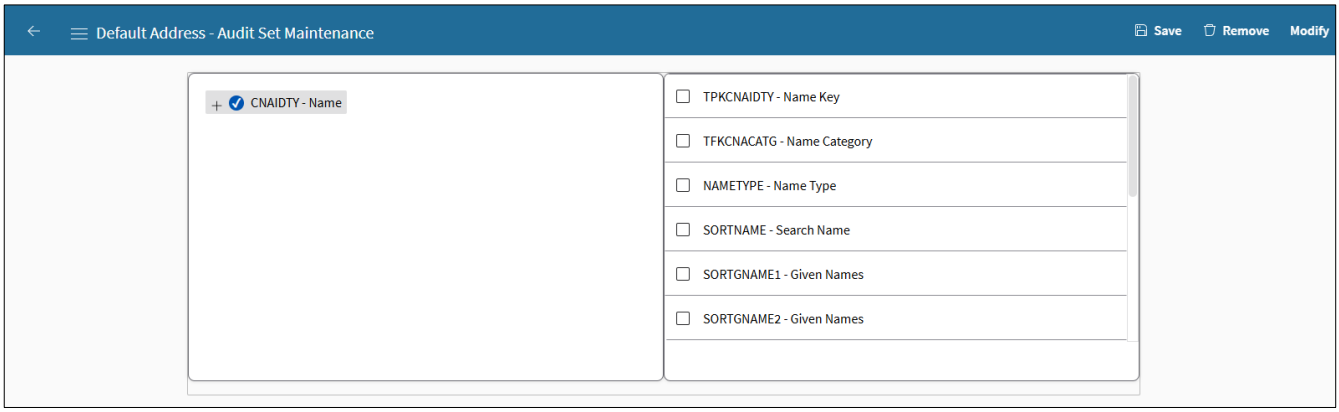

Image 16

When expanded it displays the relationships between the Name and Address entities, Image 17.
NOTE: It is not necessary to expand the tree to complete the Audit Set.

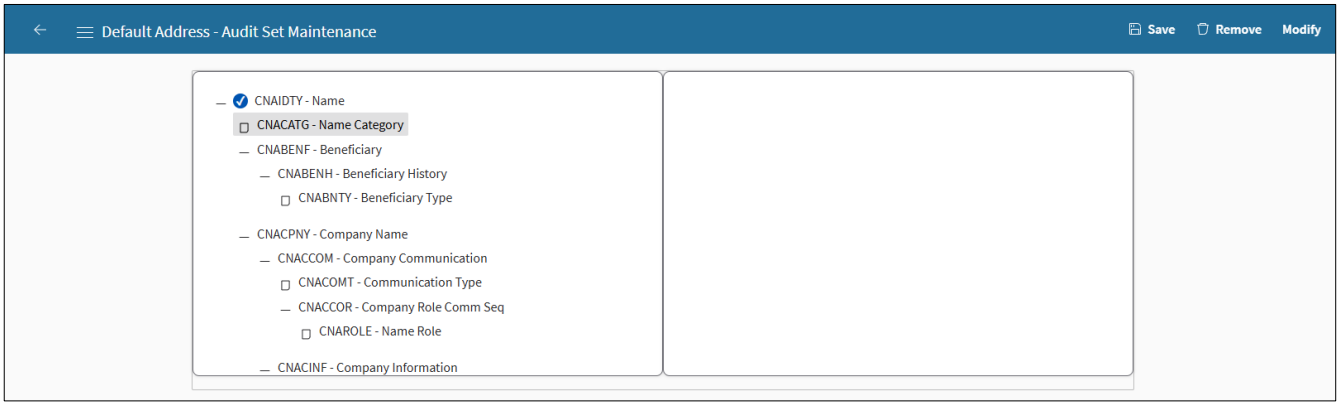

Image 17

The tick adjacent to the CNAIDTY entity indicates that fields have been selected for this entity and will be reported, Image 10.

The list on the right side displays the fields that have been selected for the highlighted entity.
NOTE: Initially, no fields will be selected so all the entity boxes will not be ticked.

Highlight the CNAIDTY entity and select Modify to select fields for the entity, Image 10.

7.3 Audit Set Field Maintenance

Audit Set Field Maintenance enables the fields to be selected that will be included in the audit report for the entity that appears at the top of the screen, Image 18.

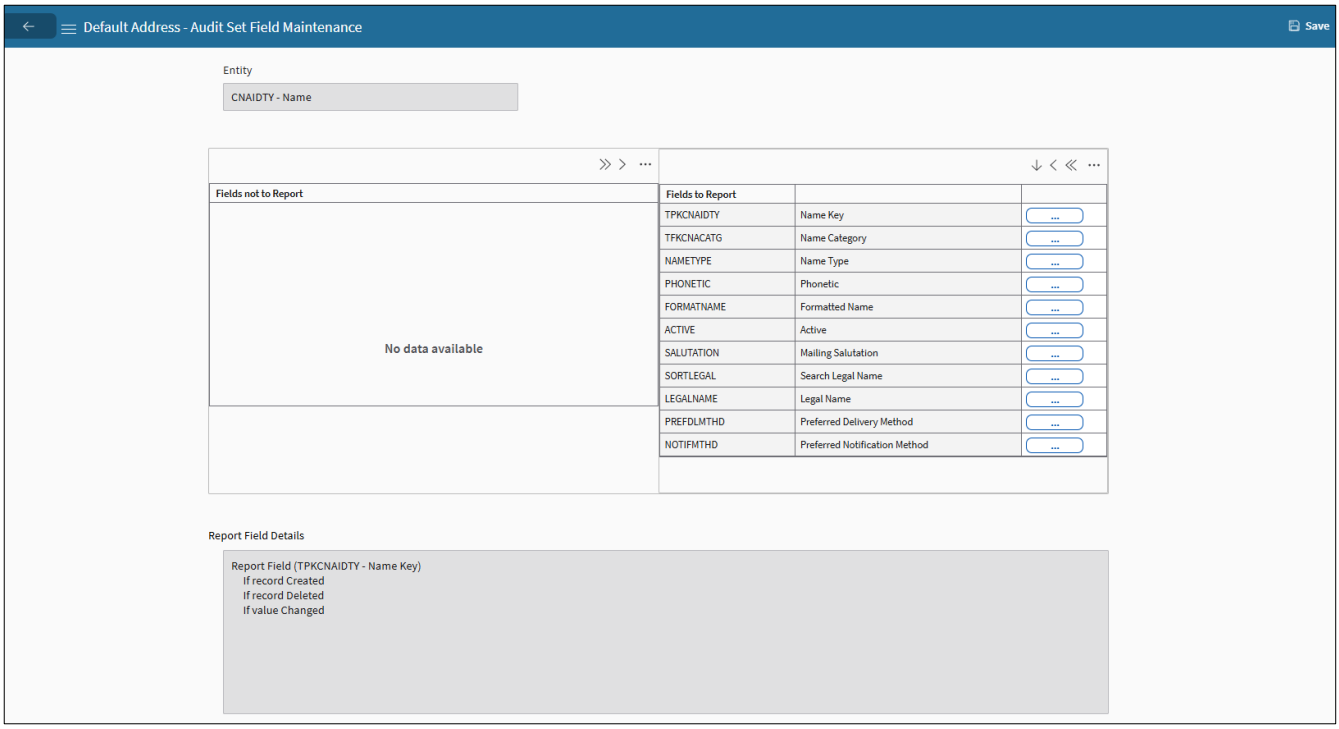

Image 18

7.4 Fields

Entity
Displays the Entity details which are non-maintainable.

Fields not to Report
Contains the fields in the entity that will not be reported when a record is created, deleted or updated. Use the assign, deassign arrows to assign and deassign.

NOTE: All fields will be audited whether assigned or not.

Fields to Report
Fields to Report contains the fields in the entity that will be reported when a record is created, deleted or updated. Use the assign, deassign arrows to assign and deassign.

Use the up and down arrows to reorder the fields.

Click on the detail button alongside each field to define the reporting attributes, Image 19.

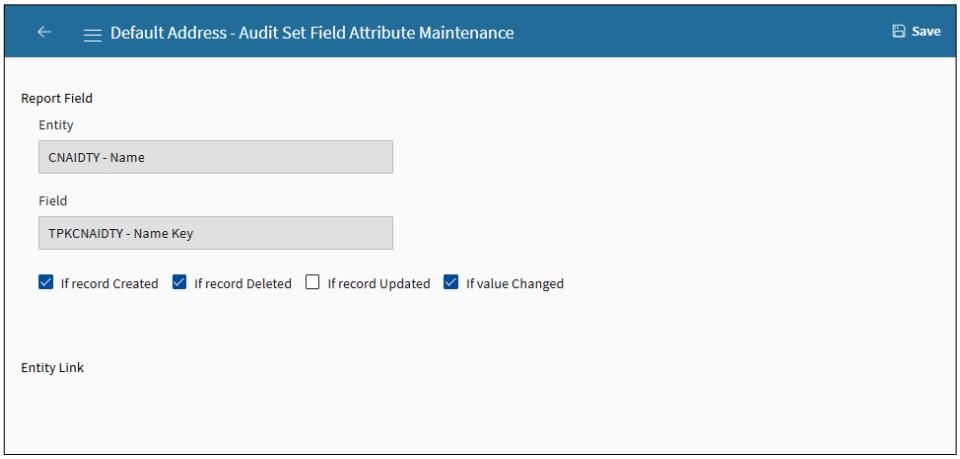

Image 19

Report Field Details
Contains the reporting attributes for the field selected in the Fields to Report and avoids the need to use the Detail Button to view the attributes selected for the field.

8. Reporting

Via menu Auditing >> Audit Report.
There are two types of audit reporting:

- An audit report (extract) facility for all/create/update/delete actions or all/selected entities within a given date range.
- Audit information displayed on any form for the current entity.

The report will contain the following information for each record:

- Entity
- Action
- User
- Node (if applicable)
- Date
- Time
- Primary Key value
- Update Form
- Function Form (i.e. form requesting action)
- The fields and their values.

8.1 Audit Report Control

This section describes how to generate an audit report extract.

Search criteria is required to be entered into the Search Profile in order that an audit report can be generated, Image 11.

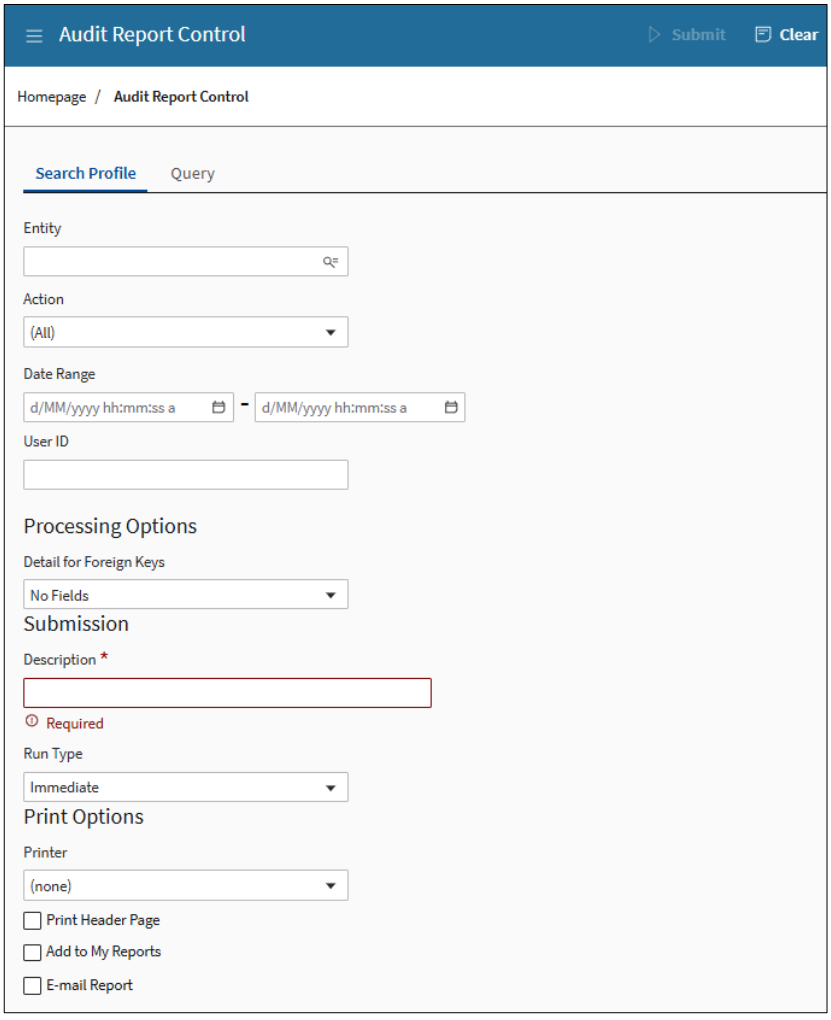

Image 11

To use a query to generate the report click on the Query tab as shown in Image 11a.

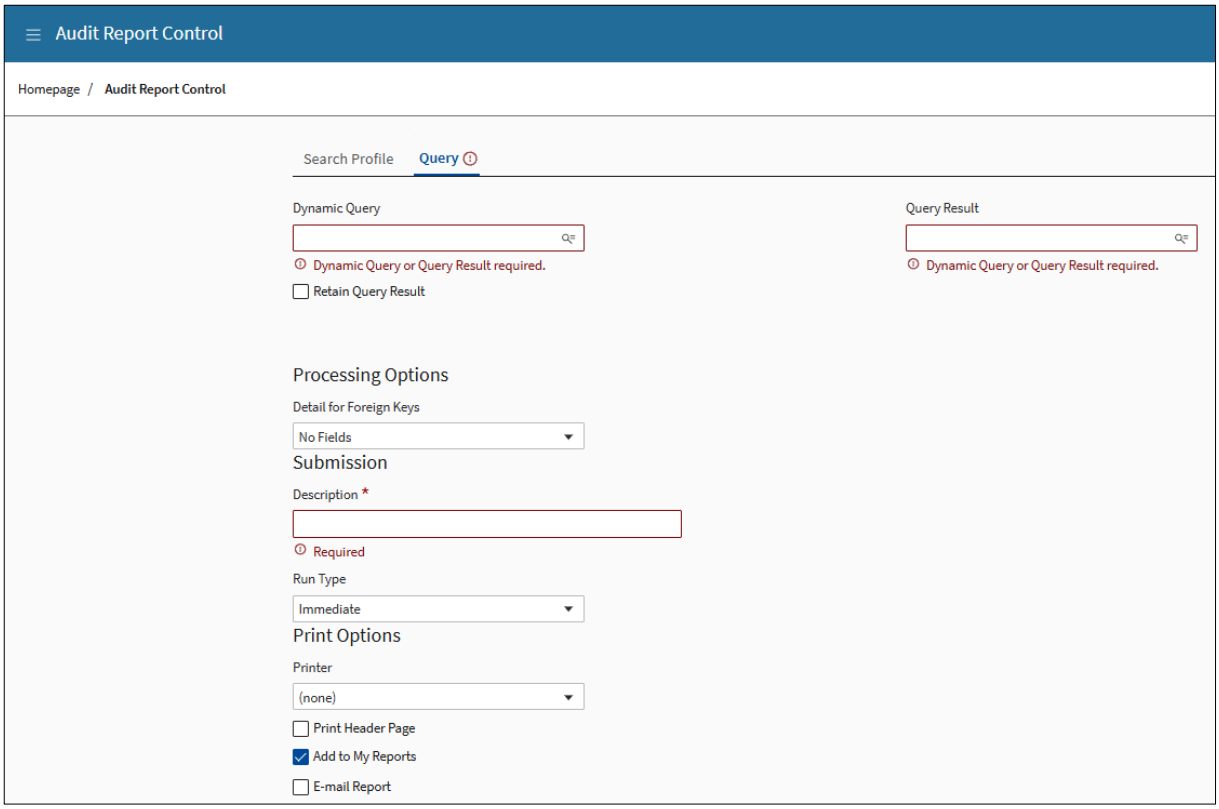

Image 11a

8.2 Fields

Entity
Enter an entity name on which to conduct the audit or select one from the Entity Pop-up list accessed by clicking the arrow button. The selected entity name and description will default into the Search Profile. If an Entity is specified, then the report will only be produced for that Entity. If left blank, the report will cover all Entities.

Action
Select an action from the drop-down list. Only records that match the action will be included in the report. The actions can be Create, Update, Delete or All audit records. The default action is All.

NOTE: If an update process is run through the batch system, the node (workstation) will not be added to the audit record even if it is available and therefore will not appear in the report. This is because the machine from which the batch process is requested may not be the machine on which the batch process is run.

Date Range
Enter a valid date using a valid format (e.g. 1/1/98, 010198, 01-Jan-1998, 01/01/1998 etc) into the From and To boxes. If dates are specified, all audit records after and including the first date are included and all records before and including the last date are included. If no dates are specified, all dates are included.
Using a double-click or F2 on the field will initiate the Date Pop-up form to assist in the selection of the required date for searching.

Detail for Foreign Keys
This field allows the user to select the amount of detail to be printed in the report. It allows the user to select how many fields from the Foreign Entity are displayed after a Foreign Key.

The options are:

No Fields	No fields from the Foreign Entity will be included.
1 Fields	1 field from the Foreign Entity will be included.
2 Fields	2 field from the Foreign Entity will be included.
Through to	
9 Fields	9 field from the Foreign Entity will be included.
All Fields	All fields from the Foreign Entity will be included, including Foreign Keys.

Query Result Description

Enter a query description or select one from the Query Result Pop-up form, accessed via the arrow button. If a query is specified, it must contain one or more entities in the result in order to be used in the reporting process. If Search Profile details as well as Query details are entered, the Query specifications will override the Search Profile.

8.3 Audit Set Report

Via menu Auditing >> Audit Set Report.

The Audit Set Report function has been provided to enable database modifications across a set of related tables to be reported as a single unit. The only Audit Set can be used to report database modifications that affect a single Name and/or multiple Names.

For Example:

1. A Phone Number modification affects a single Name. The Audit Set Report will detail the modification to the Phone Number and the Name that was affected.
2. A Surname modification affects a single Name and all the Role Linkages for the Name. The Audit Set Report will detail the modification to the Surname and all the Role Linkages that were affected.
3. An Address modification can affect many Names. The Audit Set Report will detail the modification to the Address and all the Names that use the Address as a Default Address and all the Names that have a Role Linkage that use the Address as an override.
4. A Personal Name Title modification can affect many Names. The Audit Set Report will detail the modification to the Personal Name Title and all the Names that use the Personal Name Title.

The Audit Set Report function does not capture any additional information into the Audit table, (CAUAUDT), but is reliant on all Name and Address Entities being audited. The Audit Set Report function consists of the Audit Set Maintenance and Audit Set Report menu options. The sections below describe how to establish a comprehensive Audit facility to track all modifications to the Name and Address system.

8.4 Establishing a Name and Address Audit Set

The Audit Set Maintenance menu is used to define what database modifications to Name and Address tables are to be reported. To define an Audit Set for the Name and Address Register all Name and Address Entities need to be audited.

Go to menu Auditing >> Audit Model Maintenance.
Select CNA Name and Address, Image 12.

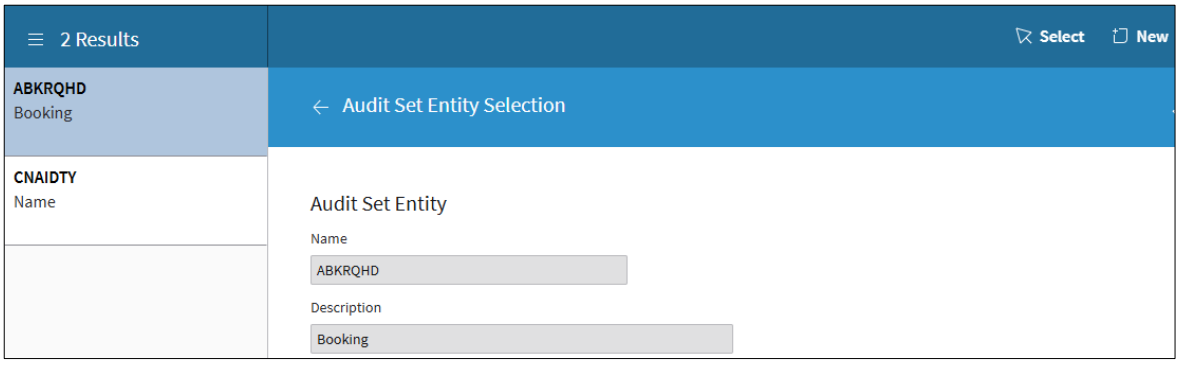

Image 12

Select the Audit Set, Image 13.

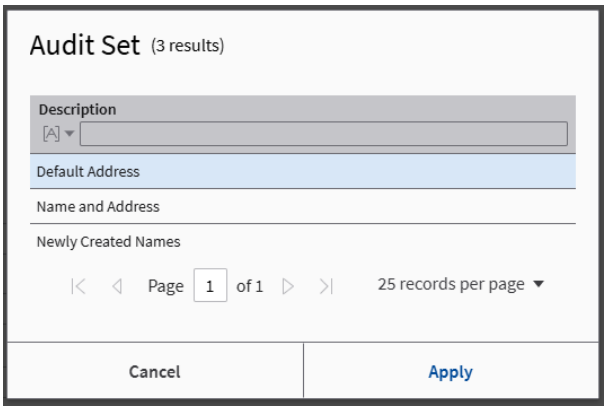

Image 13

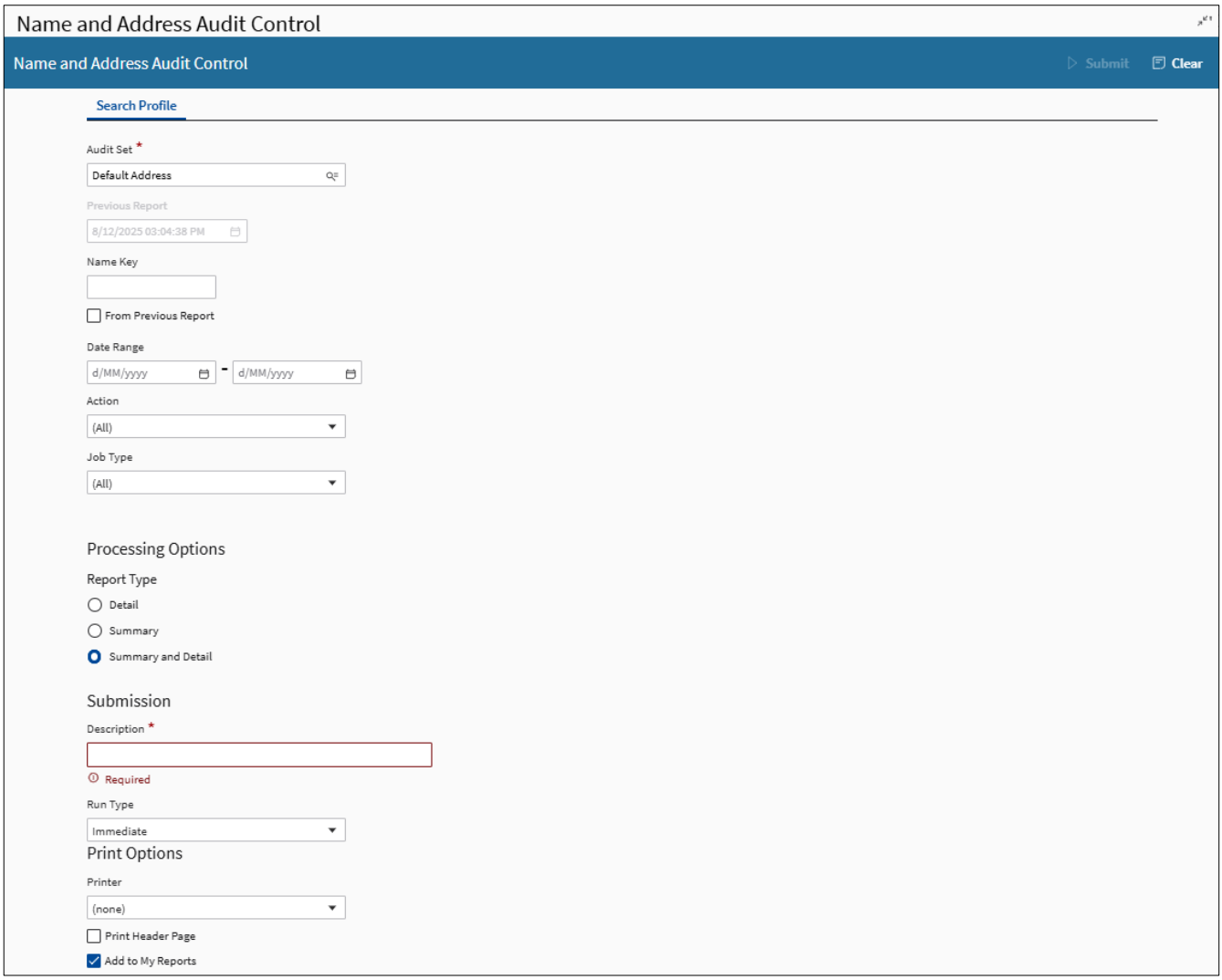

Image 13a

8.5 Audit Set Maintenance

The establishment of an Audit Set can best be described by example. It is recommended that you adopt this example and perform any adjustments after viewing the reports it produces.

Select the Auditing >> Audit Set Maintenance menu option, Image 14.

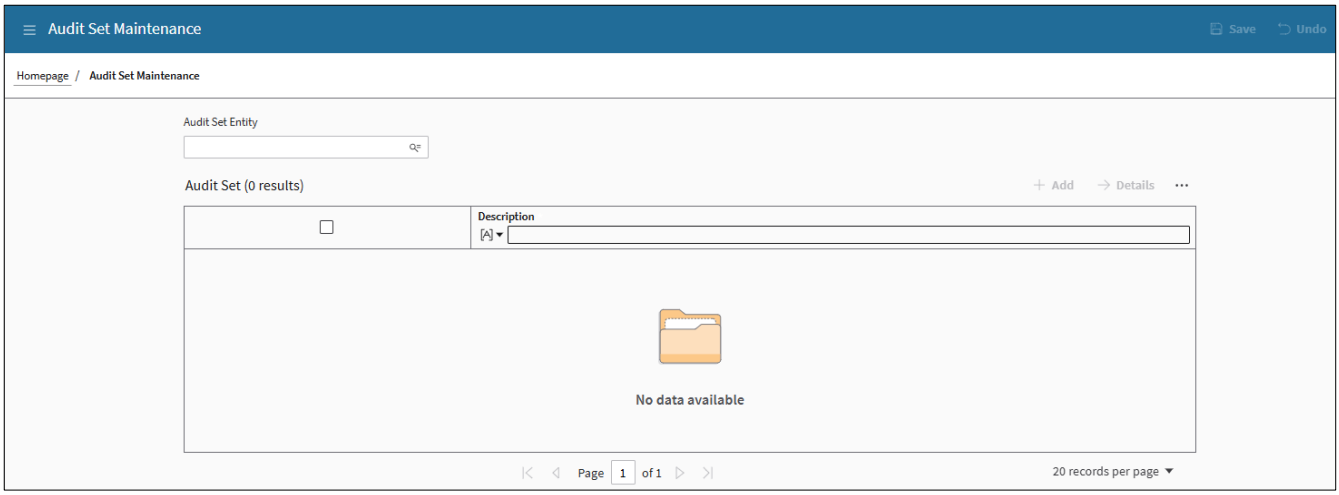

Image 14

Click in Audit Set Entity and select the Audit Set Entity of CNAIDTY Name, Image 15.

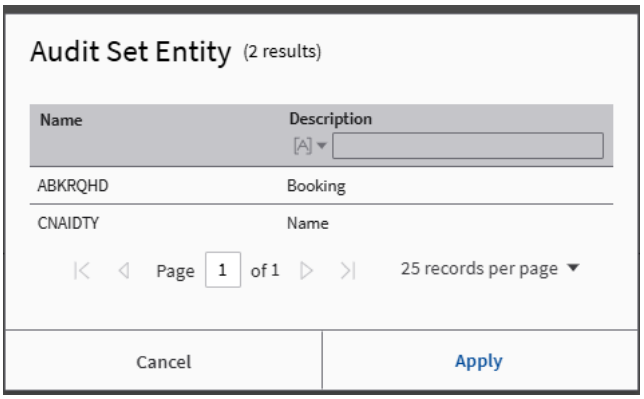

Image 15

Click on Default Address, then Details Image 16.

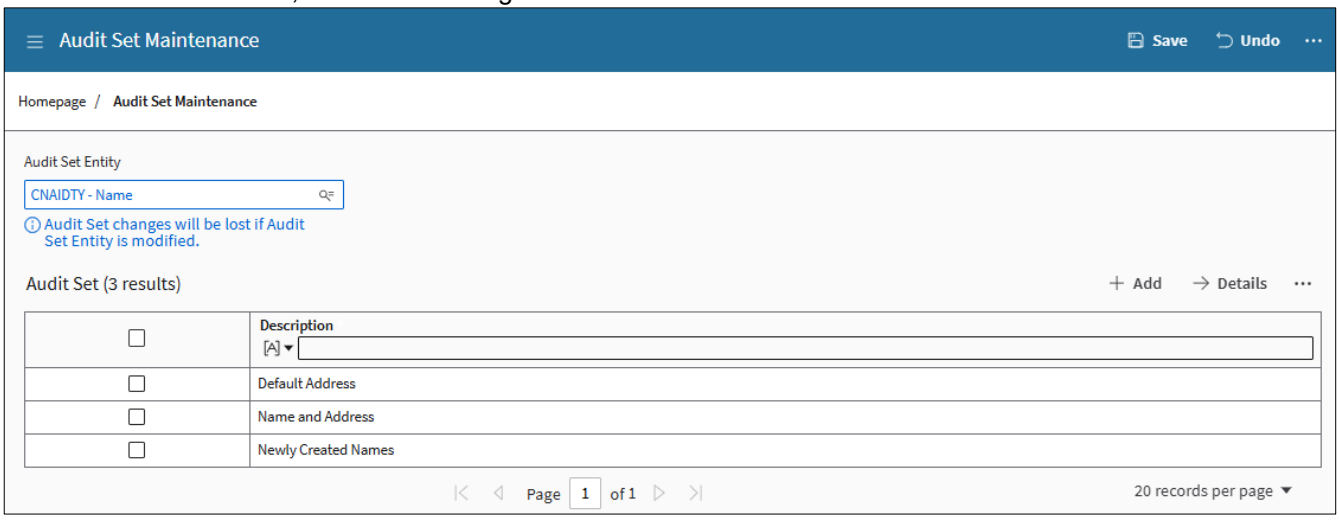

Image 16

Define what modifications are to be reported, Image 17.

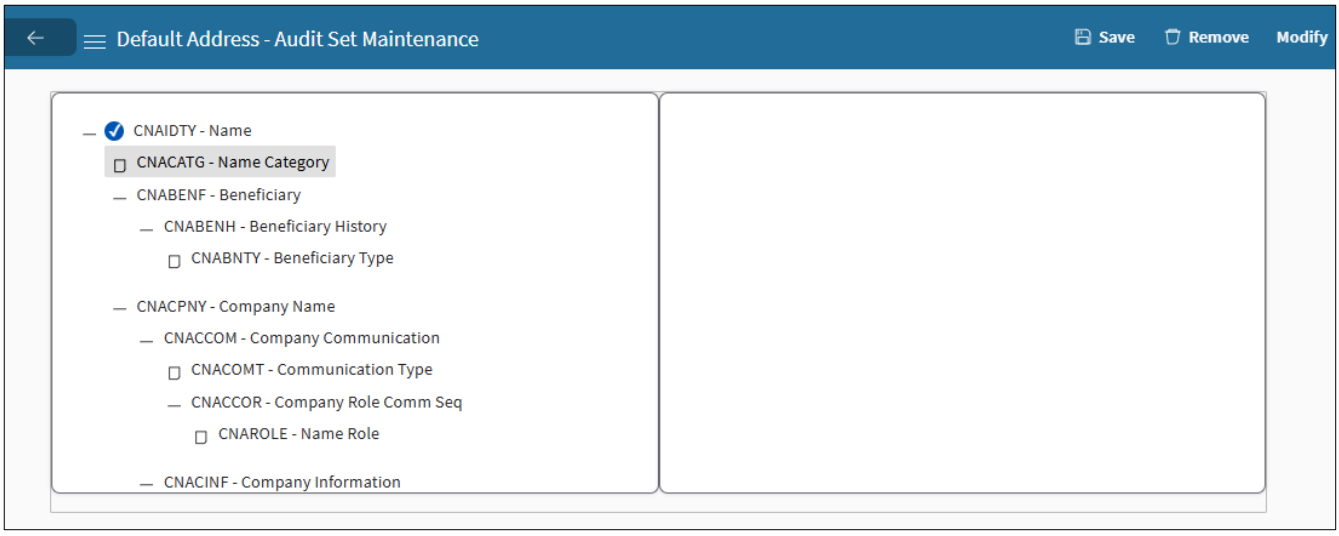

Image 17

Click the + adjacent to CNAIDTY – Name to display the entire Name and Address relationship structure, Image 18.

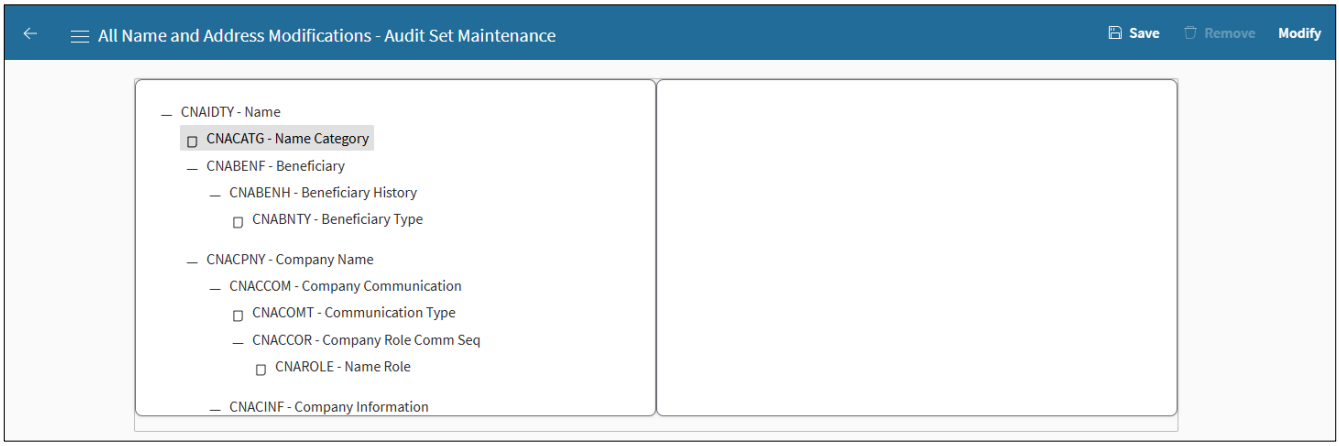

Image 18

The Tree on the left hand side displays the relationships between the Name and Address entities. Click on the Entity you want to include, then Modify, Image 19.

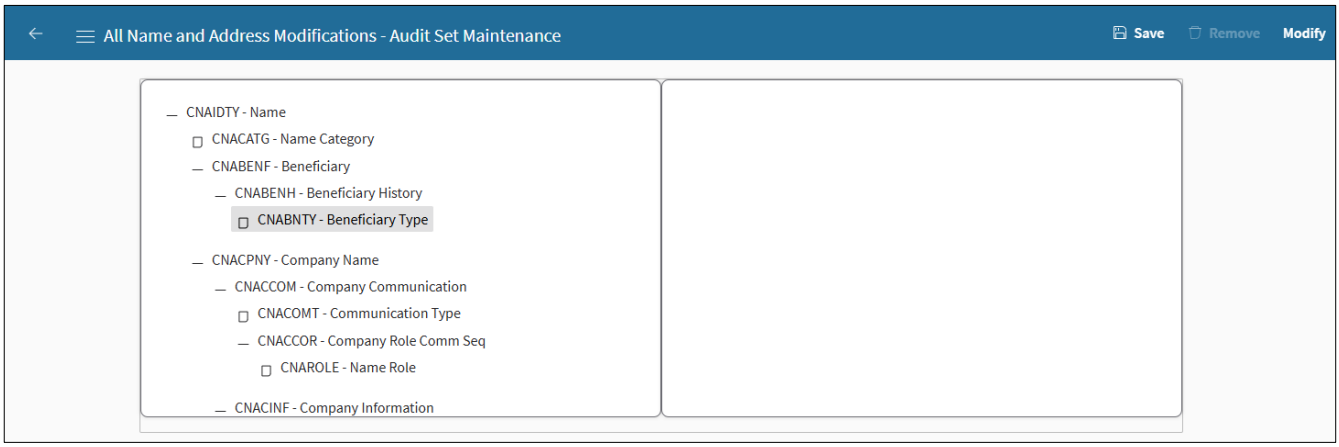

Image 19

Assign over the fields to be audited and Save, Image 20.

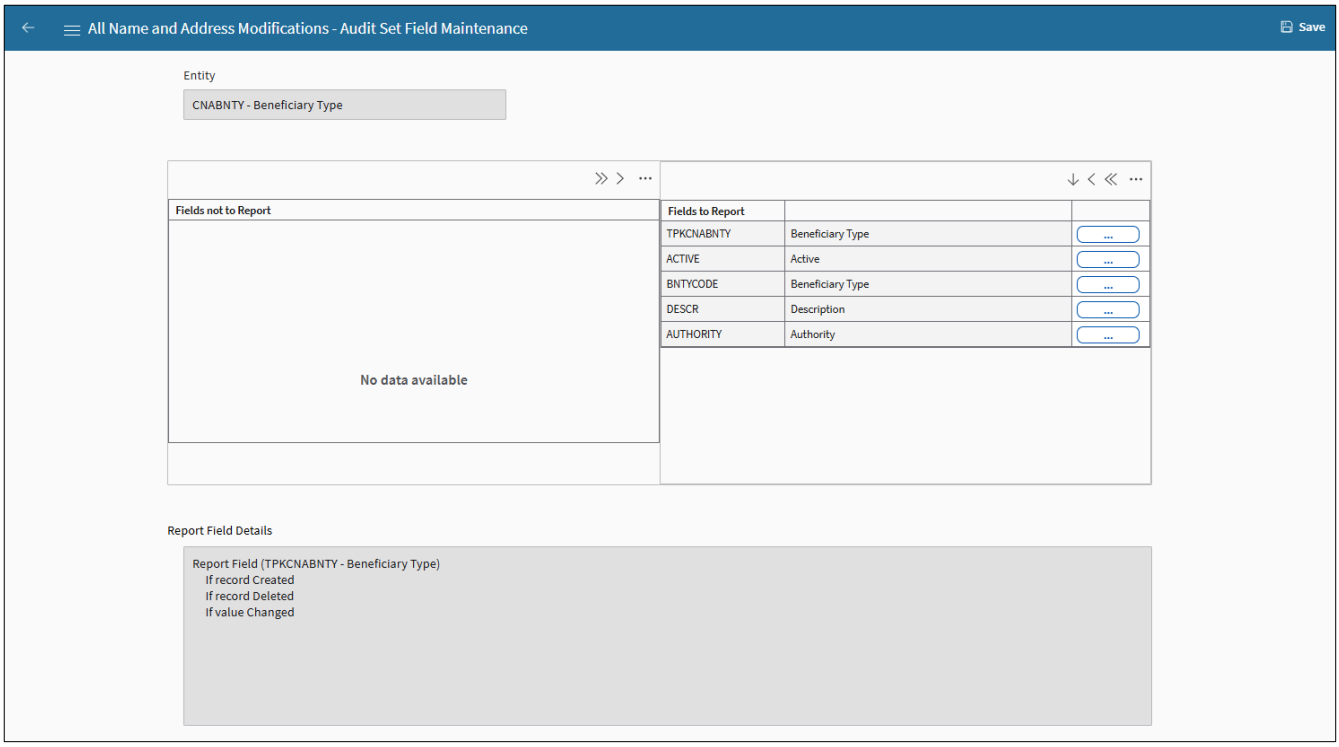

Image 20

Click on the detail button next to each field to see what type of change will be recorded, Image 21. These are the default values selected.

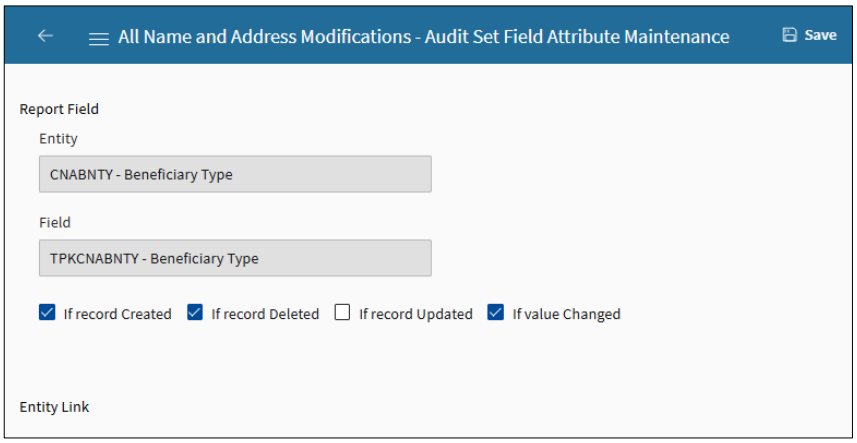

Image 21

When fields will be reported:

- If record Created - when a new record is added.
- If record Deleted - when a record is deleted.
- If record Updated - when a record is updated in the entity regardless of whether the value of the specific field is changed.
- If value Changed - when a record is updated in the entity and the value of this specific field is changed.

NOTE: If record Updated and If value Changed indicators are dependent on each other. Checking on the If record Updated indicator will automatically check off the If value Changed indicator. Checking off both the If record Updated and If value Changed indicators will mean the field is not reported when the record is updated.

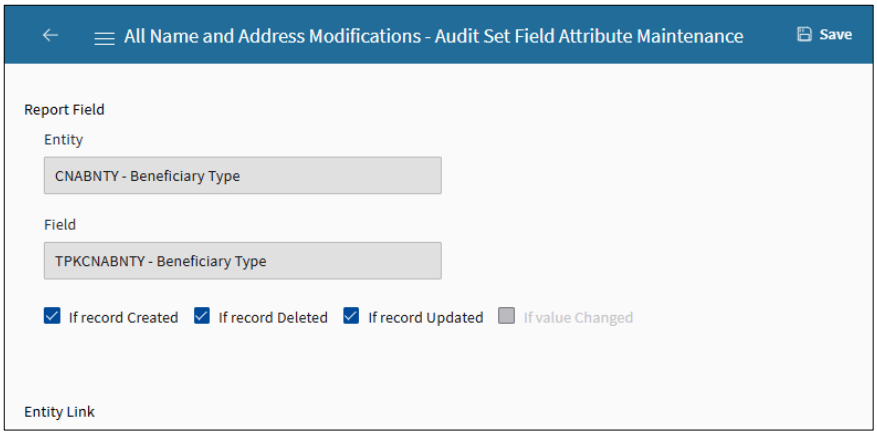

Image 22

Close the entity you've assigned by using the plus, then you can see the next Entity so you can move down the list and assign the entities and fields required. Image shows Communication Type, so click on Modify to select the fields, Image 23.

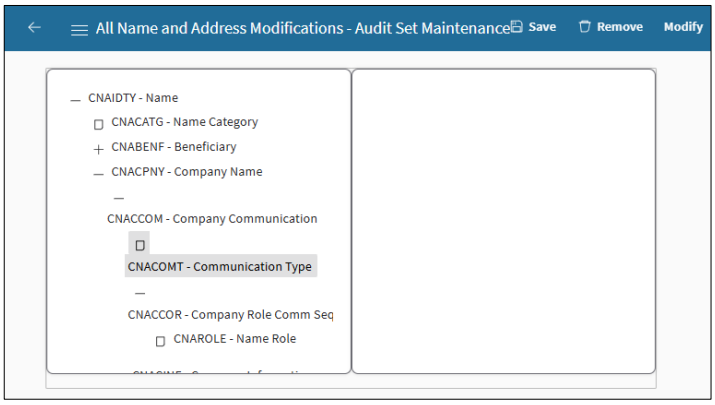

Image 23

Once an Entity has been assigned a tick will appear next to the Entity, Image 24.

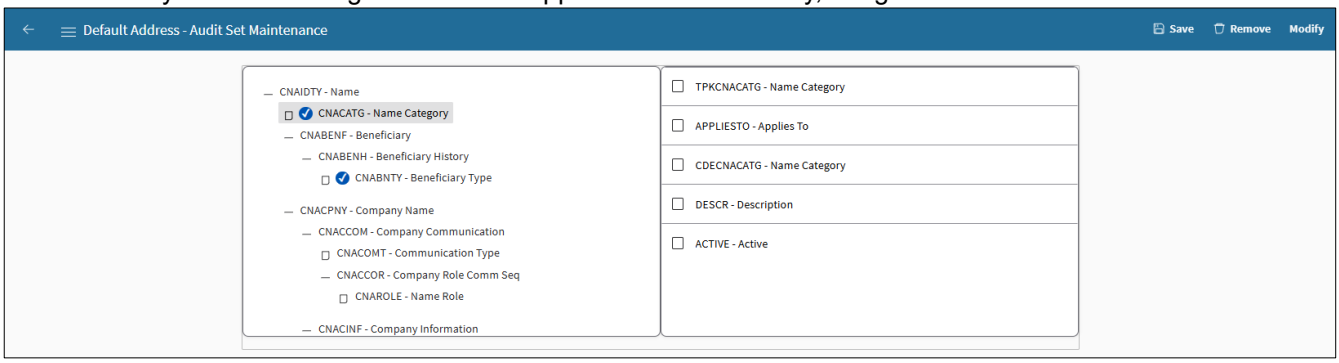

Image 24

8.6 Entity Link

The Entity Link is only relevant to Foreign Key fields, Image 26. A Foreign Key always begins with the code TFK (Table Foreign Key). This shows there is a unique link to another entity.

NOTE: Table is another word for Entity.

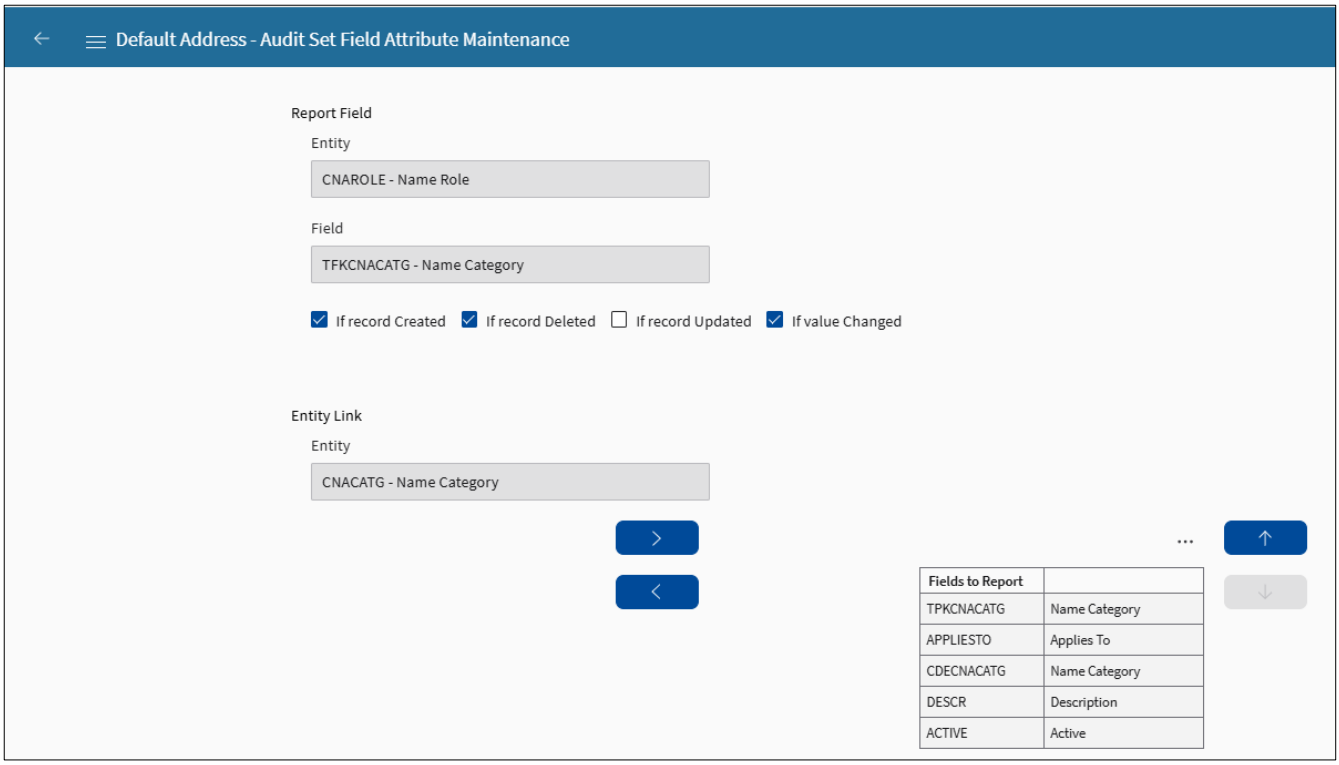

Image 26

8.7 Why a Foreign Key would be Assigned

TKFCNACATG – Name Category has been assigned to Entity CNAROLE – Name Role in Image 26.

The TFKCNACATG field is a foreign key to the Name Category entity CNACATG. The Entity Link allows for the optional selection of CNACATG fields to be reported in association with a TFKCNACATG value.

For Example:
If the Name Category on a Company Name is changed from Propriety Limited to Publicly Listed, the Audit Set report will show a change in TFKCNACATG. The inclusion of the DESCR field from the CNACATG entity will report that the TFKCNACATG value has been changed from Propriety Limited to Publicly Listed in conjunction with the actual TFKCNACATG change.

8.8 Audit Set Entities to Select

There is no need to define reporting fields for parameter entities as the maintenance of these entities is limited to the application administrator and their content is modified very infrequently.

NOTE: The impact of modifying a parameter entity can result in thousands of Names being reported.
For Example: If the CNATITL – Personal Name Title is included in the Audit Set then a modification to a Personal Name Title from MR to Mr would result in every personal name that has a MR title being reported.

NOTE: To apply a modified Personal Name Title to all the formatted names that use the Title, Rebuild Formatted Names needs to run. These Rebuild functions will update the relevant master files that will be reported in the Audit Set.

8.9 Audit Set Report

The Audit Set Report is usually run when required. The From Previous Report indicator on the Audit Set Report Control provides the ability to report all modifications that have occurred since the report was previously produced. For the From Previous Report function to work a report must be produced to provide the starting point. The Previous Report will automatically default to the current date, without a time, as no report has previously been produced, Image 27.

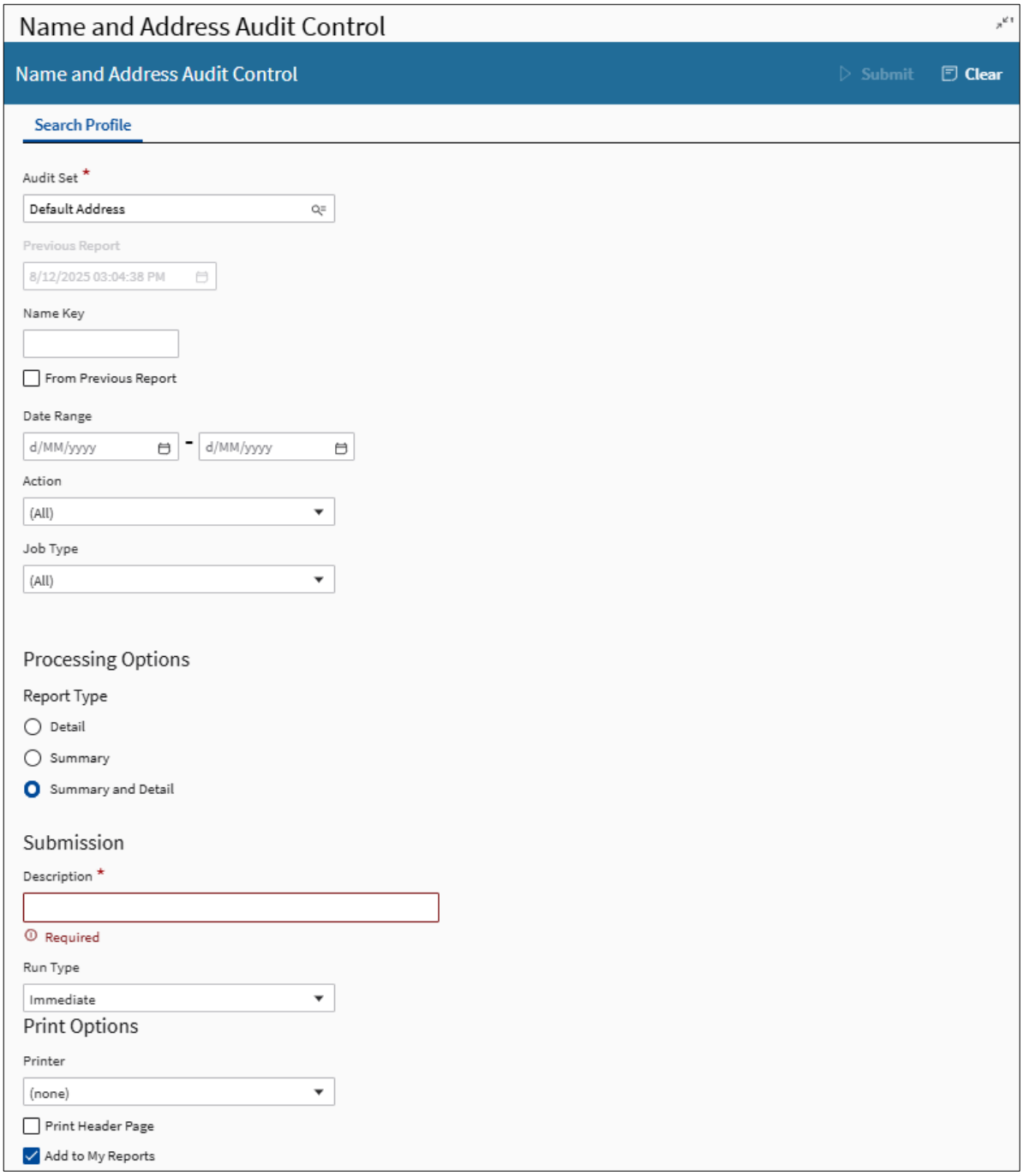

Image 27

8.10 Fields

Audit Set
Select the Audit Set Pop Up Button to select a previously defined Audit Set.

Previous Report
The Previous Report field will automatically default to the current date without a time if no report has been previously produced. Otherwise, it will automatically default to the date and time at which the report was previously produced.

Name Key
The Name Key field allows the entry of a specific Name Key that is displayed on the Personal and Company Name Maintenance forms. The report produced will only contain database updates that affect this Name.

From Previous Report
Check the From Previous Report checkbox if a report is required for all database changes since the last report.

Date Range
The Date Range entry fields are enabled if the From Previous Report indicator is checked off. The report produced will only contain database updates that occurred between the two dates.

Action
The Action dropdown list box allows for the selection of what type of database modifications to report. This selection allows you to limit the report to only show records that were created, or records that were deleted, or records that were updated. The options available form the dropdown are: (All), Create, Update and Delete.

Job Type
The Job Type dropdown list box allows for the selection of what type of job performed the database modifications. This selection allows you to limit the report to only show database modifications that were performed by Immediate or Batch jobs. Selecting Immediate will eliminate the thousands of updates that would have been reported after a Name and/or Address Rebuild function is performed.
The options available from the dropdown are: Immediate, Batch and (All).

Report Type
Summary report is a compressed list of the Names that have been modified or have had subordinate entities modified. For Example: If a new Role Linkage is added to a Name then the Name will be reported regardless of whether the name itself was modified.

Detail report is a comprehensive report of the Name and Address database updates and the names that were affected.

Summary and Detail report is a combination of the above report types.

Ad Hoc Reporting
Use the other fields shown in Image 27 to create a specific report:

- Name Key field allows the entry of a specific Name Key, as displayed on a Personal or Company Name. The report produced will only contain database updates that affect this Name.
- Date Range fields are enabled if the From Previous Report indicator is checked off. The report produced will only contain database updates that occurred between the two dates.
- Action dropdown list box enables the selection of: (All), Create, Update or Delete. This selection allows you to limit the report to only show records that were created, or records that were deleted, or records that were updated.
- Job Type dropdown list box enables the selection of: (All), Immediate or Batch. What type of job performed the database modifications. This selection allows you to limit the report to only show database modifications that were performed by Immediate or Batch jobs. Selecting Immediate will eliminate the thousands of updates that would have been reported after a Name and/or Address Rebuild function is performed.

9. Audit Enquiry

Auditing Enquiry is also available within each application. If a particular entity in an application is specified as audit enabled within the auditing parameters, then an audit log is created for this entity including any fields within it which are specified in the parameters.

To view the audit log for a particular record, go to the Option menu, then Audit. If there isn't any audit information available a message will appear, Images 28 and 29.

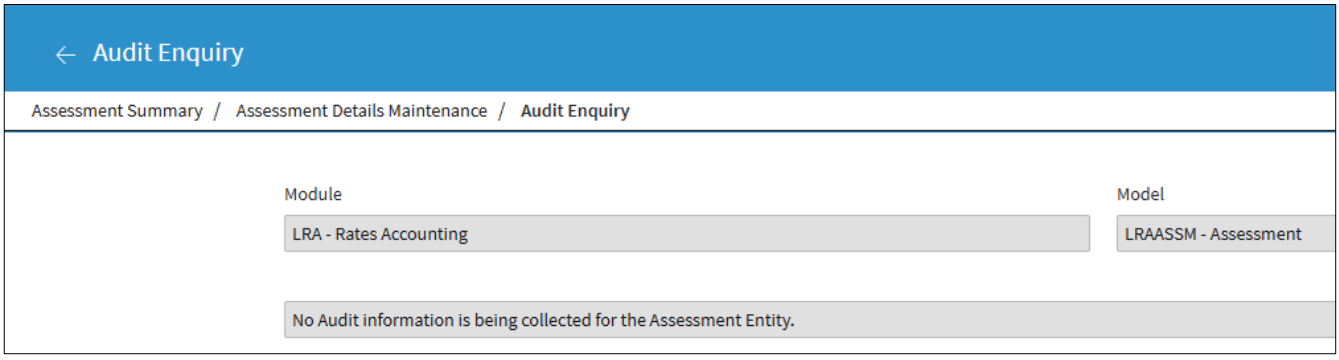

Image 28

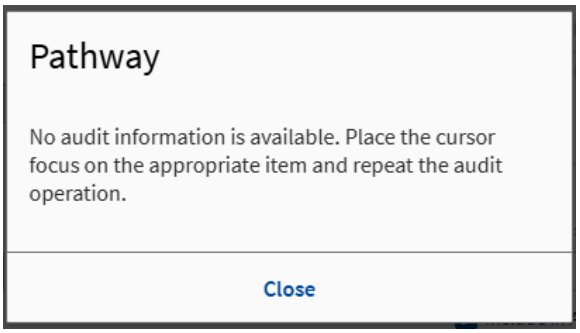

Image 29

Where audit information is available it appears as in Image 29.

Image 30 shows the data when the record was created, or the Before Image.

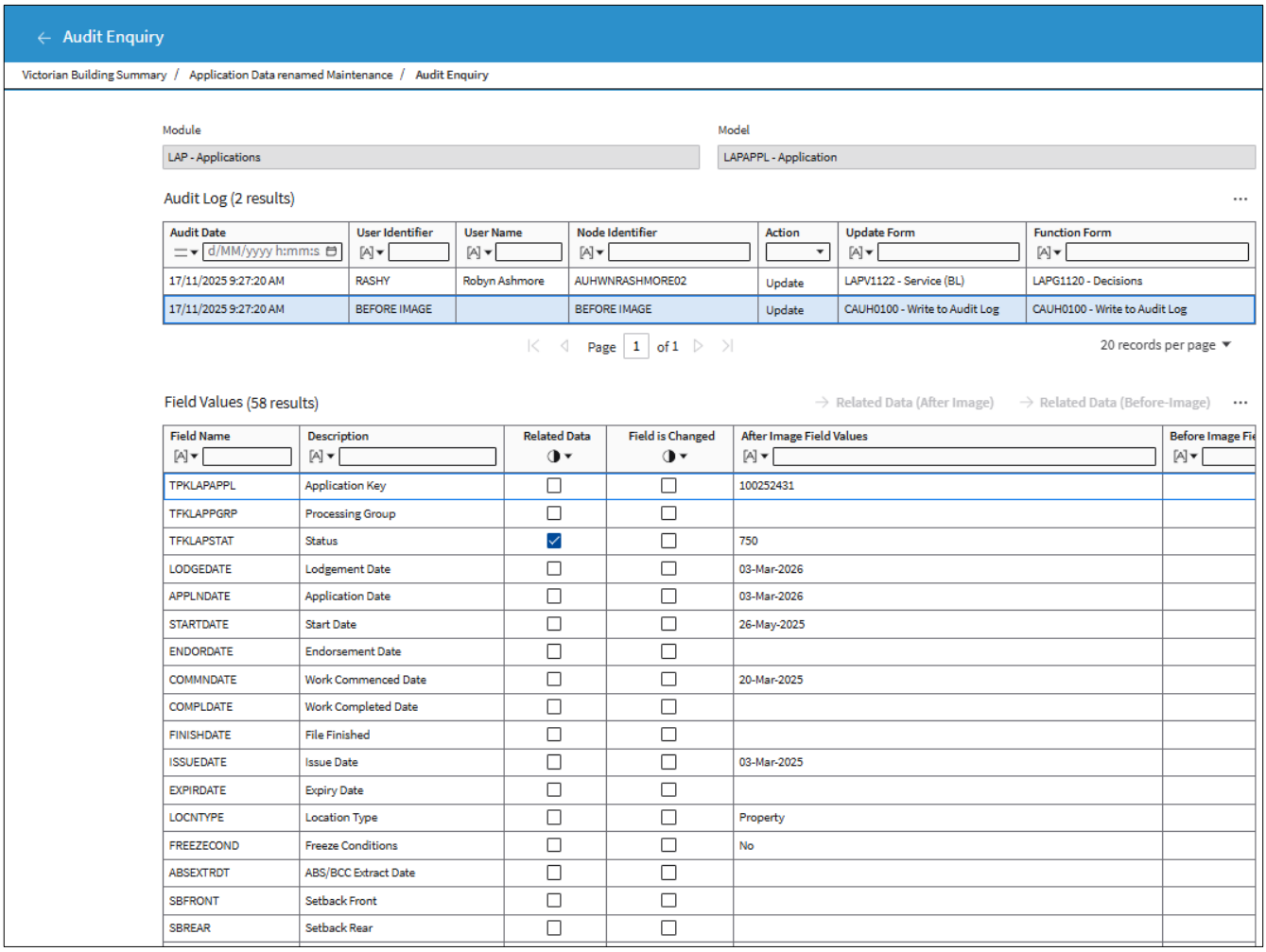

Image 30

Image 31 shows the same record after it was updated.

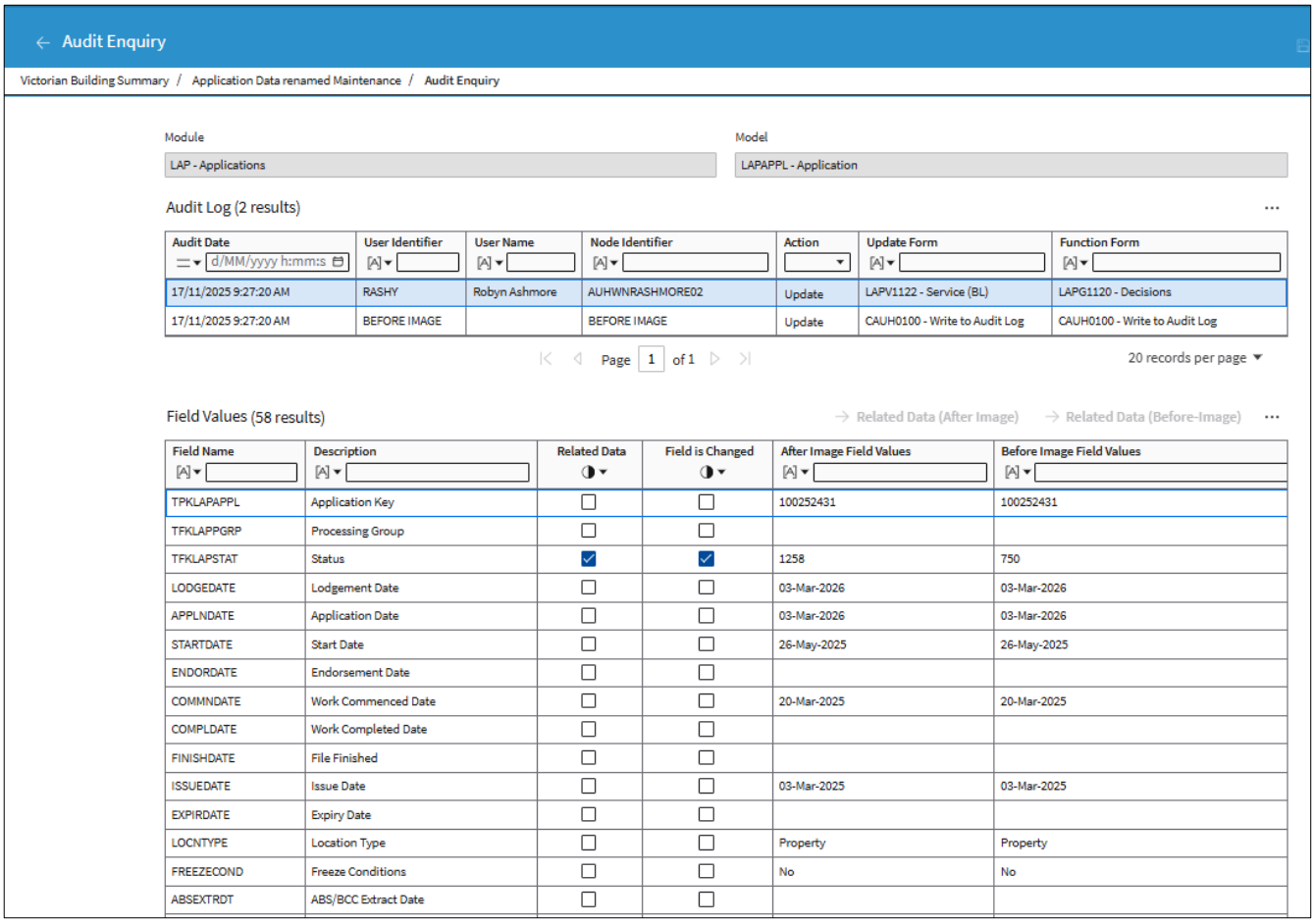

Image 31

Audit Enquiry displays the details of any create, update or delete actions which have taken place to the fields within this entity. Only those fields that have been audit-enabled via the parameters are listed.

The auditing system automatically captures a Before Image for table row updates when the previous Before Image does not match the initial database column values prior to the update being performed.

When a row of a table that is being audited is updated, a test is performed to determine whether the previous Before Image contained within the audit log is identical to the database column values prior to the modification. If a previous Before Image does not exist or there is any variation between the previous Before Image and the actual database table content then a new Before Image is automatically created.

An After Image is always created that contains the modified column values, right column shown in Image 31.

9.1 Fields

Audit Date
This field displays the date and time at which the last action was performed.

User Identifier
Displays the code of the User Account who performed the last action.

User Name
Displays the name of the User Account who performed the last action.

Node Identifier
Displays the machine identifier or node on which the last action was performed.

Action
Specifies the last action which will be either Create, Update or Delete.

Update Form
Specify the name and description of the form which performed the last action. At times this form may perform its action behind the scenes and may not be visible here.

Function Form
Specify the name and description of the form which contains the field on which the last action was performed.

Field Name
Displays the code of the field upon which the last action was performed.

Description
Displays the description of the field upon which the last action was performed.

Related Data
Flags the data that was changed is related to the update of the record.

Field is Changed
Flags the field that was changed.

After Image Field Values
Displays the data contained in the field after the last action was performed.

Before Image Field Values
Displays the data contained in the field before the last action was performed.

Related Data (After Image) Button
Enables further enquiry into the selected field concerning the After Image information.

Related Data (Before Image) Button
Enables further enquiry into the selected field concerning the Before Image information.

10. Housekeeping

The audit cleanup facility performs the function of removing all/selected entity audit records before a certain date. Options are also available for retaining First (e.g. Creation) records and Last Update records. It is recommended that a clean-up be conducted on a regular basis to avoid the audit log file becoming unmanageable and taking up too much disk space.

10.1 Audit Log Cleanup Control

Use this function to remove selected records from the audit log.

NOTE: The current day's records cannot be deleted.

Enter details specifying which records are to be deleted from the audit log.

WARNING: Leaving Entity and Before Date details blank will result in ALL records being selected.

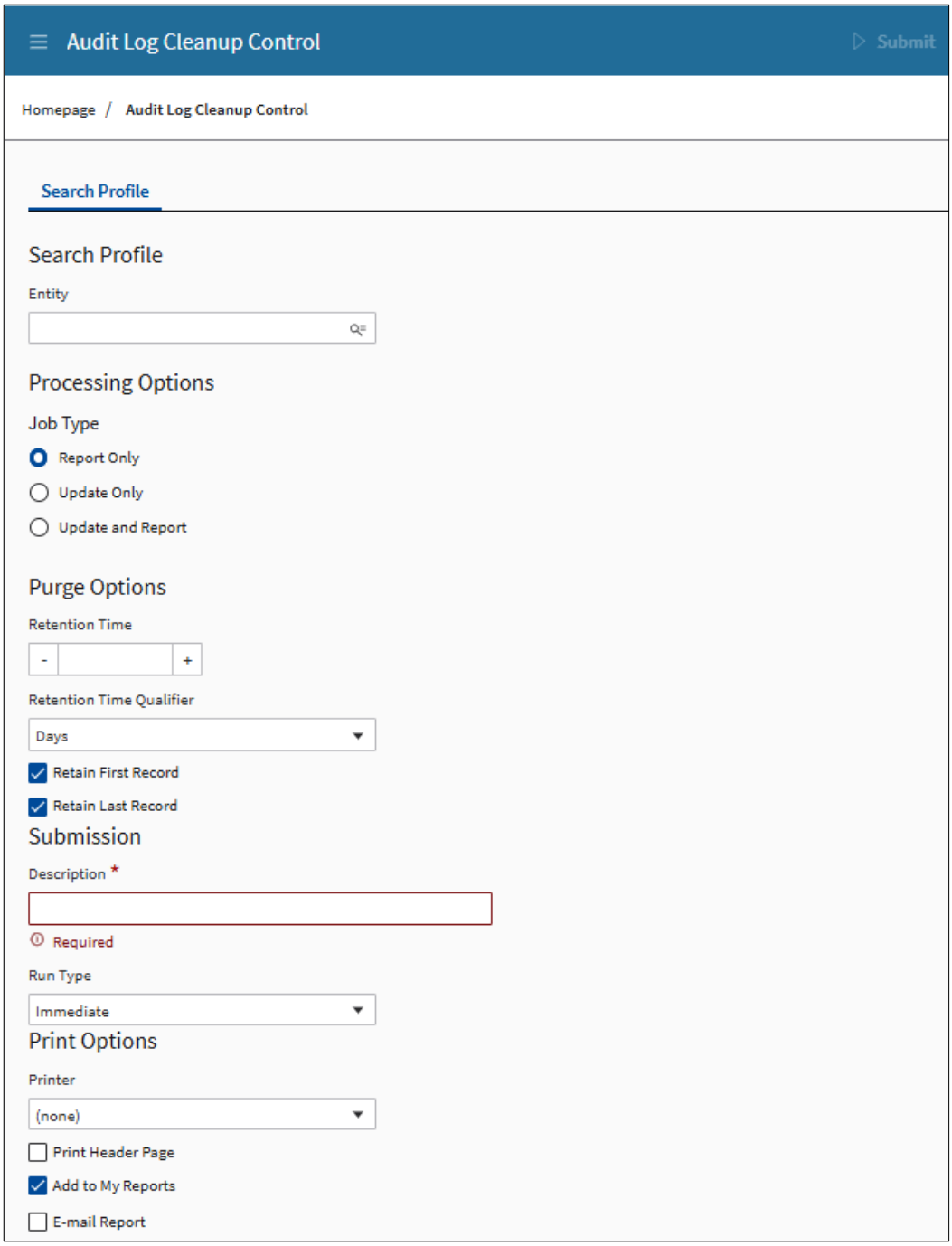

Image 32

Search Profile - Entity
An entity should be specified so the cleanup processes only that entity.

Processing Options - Job Type
The Report Only option simulates the cleanup and produces a report. This is the default. This process should always be run in Report Only mode first.

Once the results are evaluated and considered correct, run the process in Update Only or Update and Report mode to perform the removal of the audit records from Pathway.

Purge Options - Retention Time
This option allows the user to exempt from the purge those records which were created within a specified number of days, weeks or months.

Purge Options – Retention Time Qualifier
Select Days, Weeks or Months from the drop-list.

Retain First Record
If the Retain First Record option is on, the first audit record for an entity is not removed.

Retain Last Record
If the Retain Last Record option is on, the last audit record for an entity is not removed.

NOTE: As a safeguard, these options are set to on by default.

11. Basic Auditing

Suggestions on where to start with auditing. Contact your Account Manager to arrange assistance if you don't feel confident to make these changes.

WARNING: Before making changes to Pathway Auditing, take note of the Pathway database size and any other database measurement that can help gauge what impact the auditing changes are having.

11.1 Name and Address Register

Go to Auditing >> Audit Model Maintenance.
Find and assign Entity – CNA Name and Address, if it isn't already assigned Image 1.

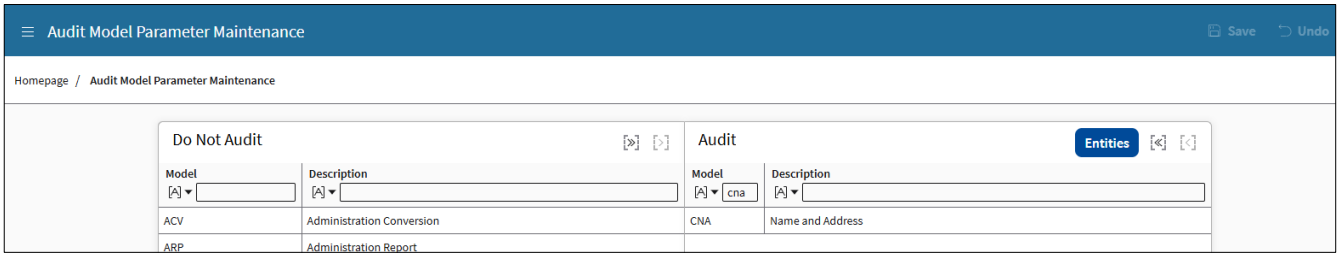

Image 1

Click on Entities and assign all Entities across, Image 2.

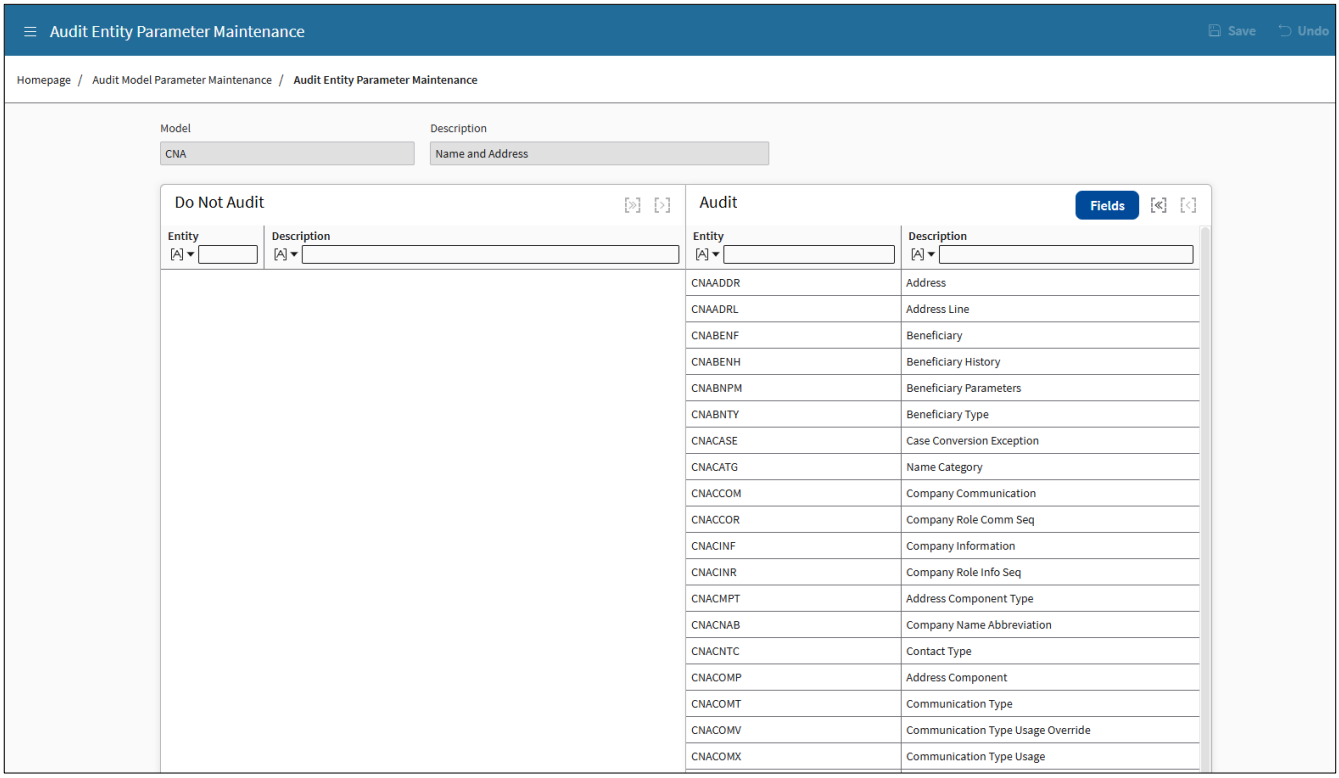

Image 2

Filter on Description param and deassign the three Entities that appear, Images 3 and 4.
Then Save.

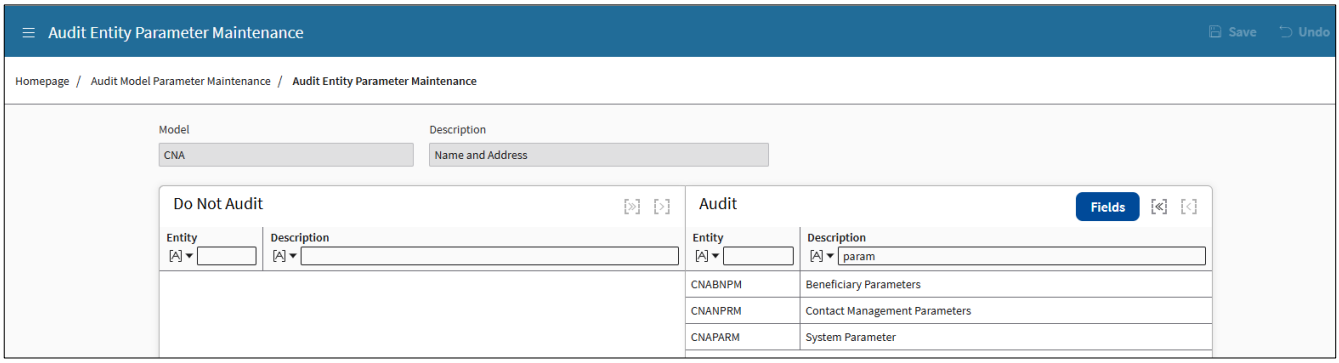

Image 3

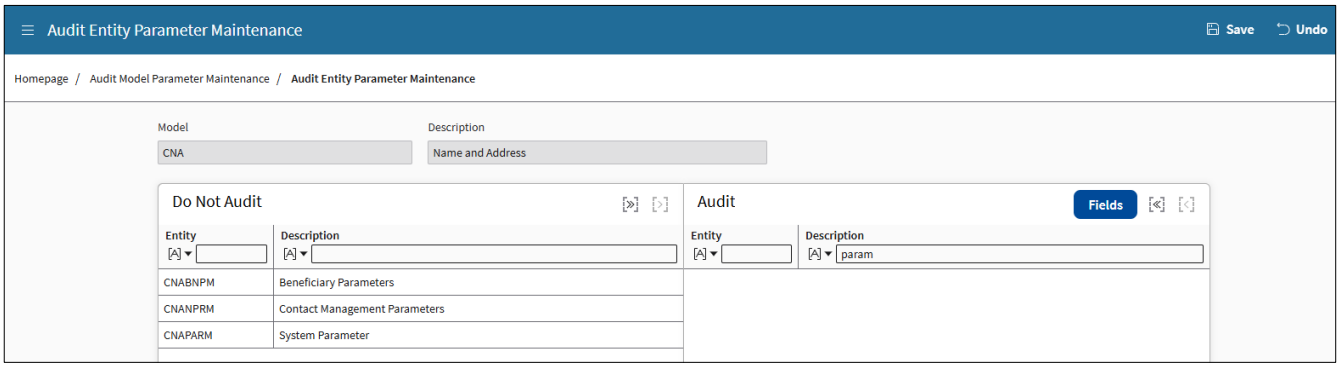

Image 4

On each Entity, click on Fields and assign all the Fields across, Image 5 and Save.

NOTE: Some fields aren't required, as they are only modified by the system, such as U_VERSION shown in Image 5. Leaving these fields assigned means there will be a little bit more data being recorded in the database. It is not a huge overhead on database storage, so you can leave all records assigned until you review the data being audited and decide what to keep assigned and what to de-assign.

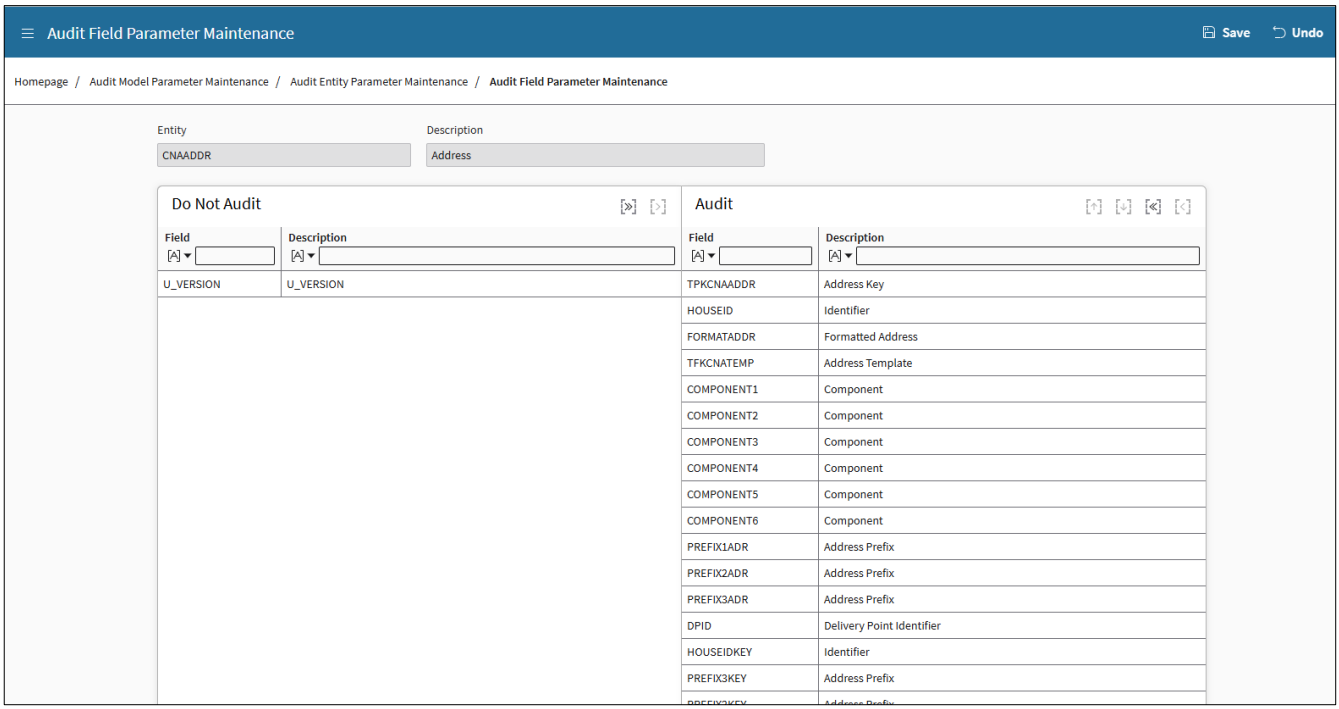

Image 5

Click on each Entity, then Fields to assign over the Fields to be audited.

You many look at some Entities and decide they are not worth auditing.

For example:
CNAADRL – Address Line, Image 6. The Entity is made up of TFK type fields, which are generated by Pathway, so it looks like this Entity isn't worth auditing.

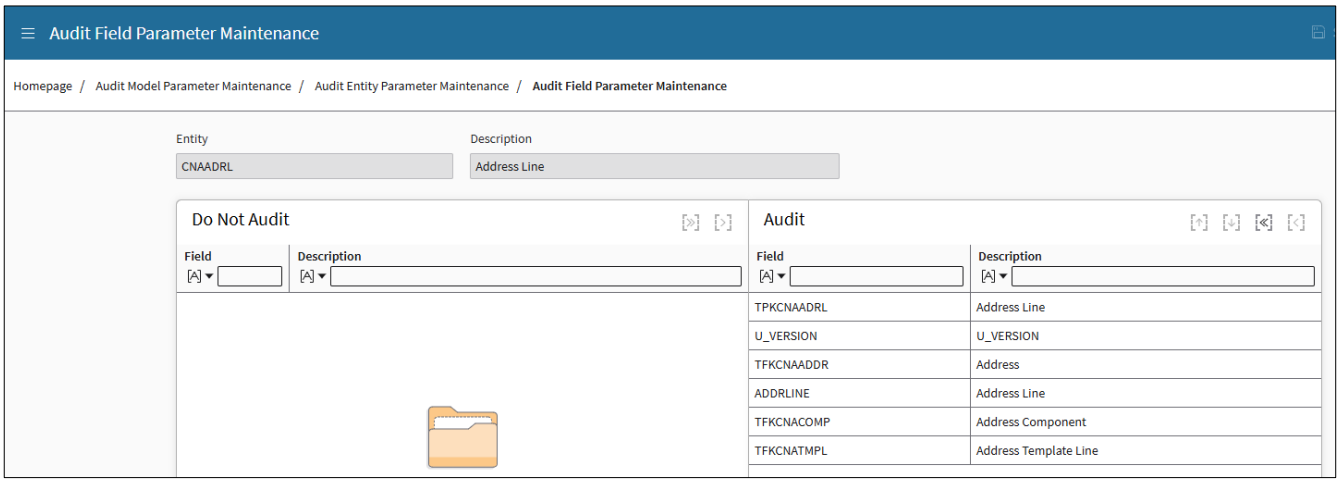

Image 6

NOTE: Review the Pathway database size daily if you have made changes to auditing and after any major process is run e.g. Address Rebuild. Once you're comfortable with the changes you can revert back to your usual database management.

NOTE: Contact your Account Manager to arrange assistance if you don't feel confident to make these changes.

11.2 Property Administration

Go to Auditing >> Audit Model Maintenance.
Find and assign Entity – LPA – Property Administration, if it isn't already assigned, Image 1.
Assign over all Entities and Save.

Open each Entity by clicking on Fields and assign the fields over, Images 5 and 6. Save as you go.

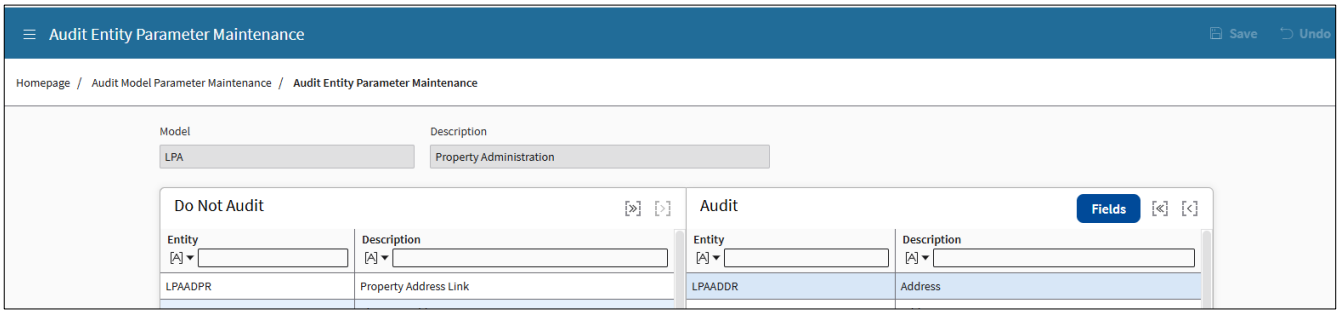

Image 5

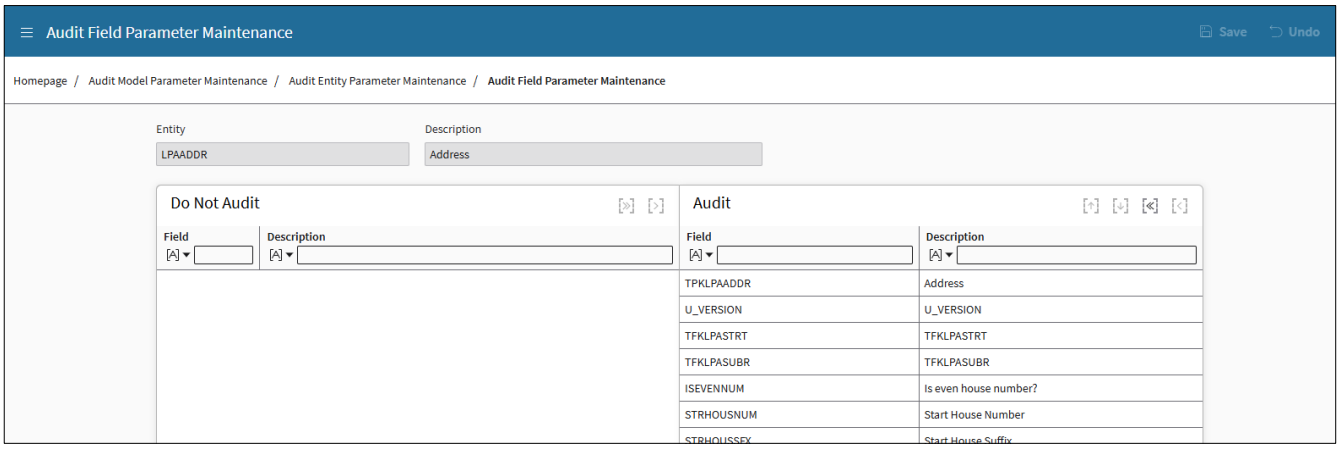

Image 6

NOTE: Review the Pathway database size daily if you have made changes to auditing and after any major process is run e.g. Address Rebuild. Once you're comfortable with the changes you can revert back to your usual database management.

NOTE: Contact your Account Manager to arrange assistance if you don't feel confident to make these changes.

11.3 Rates Accounting

Go to Auditing >> Audit Model Maintenance.
Find and assign Entity – LRA – Rates Accounting, if it isn't already assigned, Image 1.

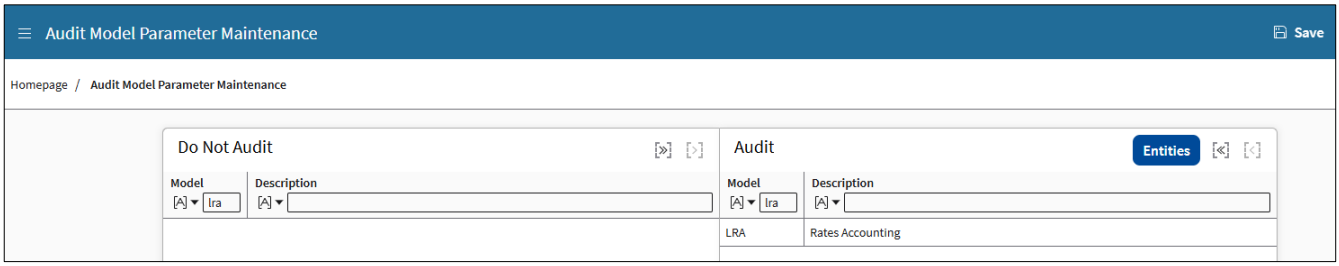

Image 1

Open Entities, assign all over and Save.

Open each Entity by clicking on Fields and assign all the Fields over, saving as you go.

NOTE: Review the Pathway database size daily if you have made changes to auditing and after any major process is run e.g. Address Rebuild. Once you're comfortable with the changes you can revert back to your usual database management.

NOTE: Contact your Account Manager to arrange assistance if you don't feel confident to make these changes.