

Audit Trail Free Overview

Introduction

Audit Trail comes in three editions; Audit Trail Free, Audit Trail Basic and Audit Trail Professional. This guide covers Audit Trail Free. For more information about Audit Trail Basic and Audit Trail Professional see Zeidman.info for more details.

Audit Trail Free monitors activity in The Raiser's Edge. Whenever a constituent is deleted it records key areas of the record to a log file. Those key areas are biographical information, address, phones and constituent attributes. It also gives you summary counts of gifts and actions.

Installation

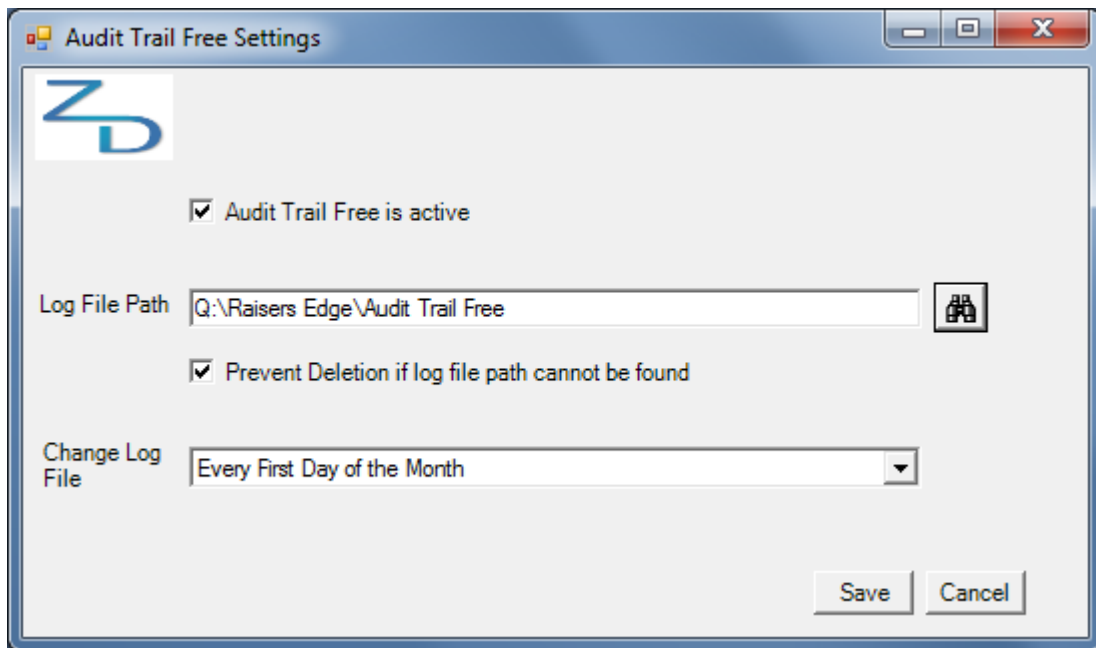
When you download Audit Trail Free from Zeidman Development and unzip the file there are two directories corresponding to two applications. The configuration application is a plug-in that should be installed on The Raiser's Edge database administrator's workstation. The main Audit Trail Free application should be installed on each workstation that needs to be monitored.

To install the applications simply run the setup.exe file in both cases and follow the wizard.

Audit Trail Free Settings and Configuration plug-in

The configuration plug-in allows you to manage Audit Trail Free. From the plug-ins area of The Raiser's Edge select Audit Trail Free.

The screen below is shown:

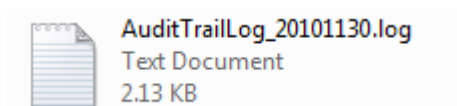


In this screen you are able to:

- Activate or deactivate Audit Trail Free so that it monitors and logs constituent deletions.
- Choose the directory where the log files are stored. This should be somewhere on the file sever that everybody has access to.
- Decide whether deletions should be prevented if the log file path cannot be found. If the file server is down or if a specific user does not have the network location mapped, deletions can be prevented until this is rectified.
- Decide how often the log file should be recreated. The following options are available:
 - Every Day
 - Every First Day of the Month
 - Every First Day of the Year
 - If Larger than 10k
 - If Larger than 100k
 - If Larger than 1MB

If the file is set to be recreated according to the size and there is already a file with the same date then the existing file name will be changed by giving it an index.

The file name format is shown below:



The date is in the format year, month, day



Audit Trail Free Client

The majority of users that have The Raiser's Edge installed on their workstations should have Audit Trail Free installed. However if they do not have rights to delete constituent records then they do not need to have Audit Trail Free installed.

The application runs silently in the background and the user is able to continue working as normal.

Examining the log file

From time to time the database administrator should examine the log files to see which constituents have been deleted. The format of the log file is shown below. The image below shows one deletion. This record is very simple as it does not contain any address, phone information or constituent attributes.

The log tells you when the record was deleted and by who. It gives you the name and constituent id of the record and for each field that had an assigned value it gives you that value. It also tells you the total number of gifts and actions that this constituent had.



----- Start Log 30 November 2010 18:37 Deleted by Supervisor-----

jeff Thomas (8739) Constituent Auto display annotation? No
jeff Thomas (8739) Constituent ID 8739
jeff Thomas (8739) Constituent First Name jeff
jeff Thomas (8739) Constituent Constituent is an honour/memorial? No
jeff Thomas (8739) Constituent Key Indicator 2
jeff Thomas (8739) Constituent Surname Thomas
jeff Thomas (8739) Constituent Marital status Married
jeff Thomas (8739) Constituent Organisation Matches Gifts No
jeff Thomas (8739) Constituent Primary Addressee Edit No
jeff Thomas (8739) Constituent Primary Salutation Edit No
jeff Thomas (8739) Constituent Receipt type One receipt per gift
jeff Thomas (8739) Constituent Gender Male
jeff Thomas (8739) Constituent Constituent is a canvasser? No
jeff Thomas (8739) Constituent Title 1 Mr
jeff Thomas (8739) Constituent Is Constituent Yes
jeff Thomas (8739) Constituent Name jeff Thomas
jeff Thomas (8739) Constituent Inactive No
jeff Thomas (8739) Constituent Anonymous No
jeff Thomas (8739) Constituent No Valid Addresses No
jeff Thomas (8739) Constituent Deceased No
jeff Thomas (8739) Constituent Canvasser Inactive? No
jeff Thomas (8739) Constituent Constituent pays tax? Unknown
jeff Thomas (8739) Constituent Requests no email No
jeff Thomas (8739) Constituent Address Send mail to this address Yes
jeff Thomas (8739) Constituent Address Type Home
jeff Thomas (8739) Constituent Address Preferred Yes
jeff Thomas (8739) Constituent Address Indicator Preferred
jeff Thomas (8739) Constituent Address Seasonal address No
jeff Thomas (8739) Constituent Address Country United Kingdom
jeff Thomas (8739) Constituent Address Linked No
jeff Thomas (8739) Constituent Address Print position? No
jeff Thomas (8739) Constituent Address Print org name? No
jeff Thomas (8739) Gift Summary Total number of gifts 0
jeff Thomas (8739) Action Summary Total number of actions 0
----- End Log 18:37-----

