City National Online Portal
- Audit Reporting
User Guide For:
City National Business Suite\textsuperscript{SM}
And Business Essentials
June 2020

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Audit Reporting - Overview

The audit reporting function in City National Business Suite℠ and Business Essentials allows you to generate audit reports quickly and easily. With the report data, you can review any activities by all your users, generating data that solves questions like:

- Who made this change to Mr. Smith’s permissions?
- What time did Ms. Jones send the Wire Payment?
- When did Ms. Martinez try logging in the last time?

Audit activity is available for 180 days after each activity.

There are two varieties of audit activity:

- **Audit – Login & Access** - login activity to City National Online portal
- **Audit – Activity** – activity specific to Business Suite or Business Essentials

Reports Available on the Login and Access to the System

There are many reports available in the Business Online Portal. Depending upon whether you are using Business Suite or Business Essentials, the reports available will vary. They are available in the following categories for Business Suite and Business Essentials users:

- Company maintenance
- User maintenance
- Authentication
- User self-administration
- Home page
- Reporting
- Service access
- Token*

(*)-Business Suite only; not applicable to Business Essentials

Within each of these categories are various event types. Audit reporting functions allow you to select all activities, or all within a category, or specific event types.

After generating a report, you will be able to download the results as a Comma Separated Value (CSV) file for off-line analysis or archiving, as needed.
Generating Audit Reports

To generate reports for auditing, proceed as follows:

1. Click the **Admin** tab on the top menu.
2. Select **Audit - Login & Access** from the drop-down menu. The Audit Report page will be displayed.
3. Select the date and times for the range of activities you are auditing. Clicking the calendar icon allows you to select the day. Clicking the clock icon allows you to specify the times. (If you do not select times, the system will default to 12:01 a.m. for the start time and 12:00 p.m. as the ending time for the start and end dates, respectively.)
4. Click the **Select User** box, and then click the name of the first user to be audited, and then click each additional user from your list of users. Click **All Users** if you wish to generate the report for all your users.

5. Select the **Event Category** you wish to audit, or click **All** if applicable. After you click the category, the applicable **Event Types** will appear. Click the event type or **All** if applicable.

6. When all the selections are completed, click **Generate Report** as shown above. The report screen will appear as shown below.
7. To navigate within your report, click the page numbers and other controls at the bottom of the screen as shown below. Note that the default display shows 10 events per page. Click the drop down arrow to choose larger numbers of events for each report page.

The slider control at the bottom allows you to shift from left to right on reports that do not fit on a single screen.
NOTE: The filter symbol at the top of each column allows you to select up to two conditions for your search, and you can choose the “and”/“or” Boolean operators, as applicable to refine your search.

**Downloading Results of Audit Report**

To download the results of your audit report, the system allows the data to be downloaded in CSV format.

1. After generating your report, click the **Export to CSV button** to download.

2. The download function prompts the download save/open box at the bottom of the page, as shown below. Click **Open** to view the report immediately. Click **Save**, **Save As**, or **Save/Open**, as applicable. When saving, you will need to navigate to the location in your directory where you would want to save the report.
3. The report will then appear as shown below, with the column headings as the on-screen report. You will want to adjust the column width or other format controls to make the report viewable.

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<th>D</th>
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**Audit Activity**

Audit Activity provides a variety of information for your company on processes that users undergo while using Business Suite or Business Essentials. The Audit Activity function allows you to filter the information that appears, as well as export and print it.

To perform an audit activity search:

1. Select **Audit – Activity** from the Admin menu. The Audit Activity screen will be displayed as shown below.

2. In the **Date/Time, Product Code, Function Code, Type Code, Action Mode, Entry Method, Description, User and Affected User** fields, select the type of audit records you want to search for. You can select a single field or multiple fields. For example:
   - To return all the available audit records for **ACH**, select **ACH** from the **Product Code** list.
   - To return all audit records for the last 60 days, for Jane Smith, select:
     - **Last 60 Days** from the Date/Time field.
     - **Jane Smith** from the User list.
To return all audit records for approved wire payments created from a template, select all of the following:

- **Wire – Payments** from the **Function Code** list.
- **Approve** from the **Action Mode** list.
- **Template** from the **Entry Method** list.

3. Click **Search**. The relevant search information appears at the bottom of the screen as shown below.
### Audit - Activity

**Date/Time**

04/03/2020 - 06/01/2020

**Product Code**

- Wires

**Function Code**

- Wires - Payments

**Type Code**

**Action Mode**

**Entry Method**

- Template

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