USER ADOPTION MONITOR – User Manual

Contents

Introduction

User Adoption Monitor is a productivity tool for Microsoft Dynamics CRM. It enables Managers to monitor the actions of team members associated to Dynamics CRM for their day-to-day operations.

Salient Features

- Monitor Dynamics CRM Users Actions
- Track OOB and Custom Entities Records
- Define Monitoring Period for Entities
- Define Users to be Monitored
- Define Entities and Associated Actions
- Track and monitor CRM access of Users
- Track Usage: Daily, Weekly or Monthly
- Dashboard Reporting per Entity/ Action/ Period
- Dashboard Reporting per User/ Period
- User Adoption Report Creation
- Monitor Usage Without Disrupting On-going Activity

***Note**: It helps in monitoring the actions performed on the records but does not give information about the exact field values entered or modified.*

Prerequisites

You need license for all the active users of Dynamics CRM, i.e., if there are 20 active users in CRM; you need a license for all 20 users.

For further installation instructions, refer to the *Installation Guide*, if you don`t have one, ask your vendor for it.

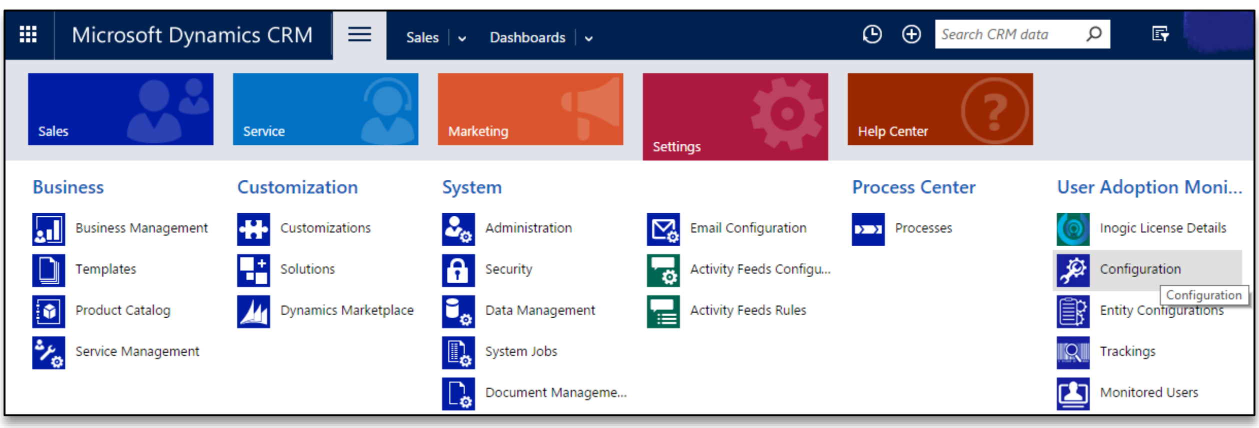
Getting Started

This section gives a general overview of the User Adoption Monitor for Dynamics CRM. The first step towards it is the creation of a configuration record.

Setting up the Global defaults for User Adoption Monitor

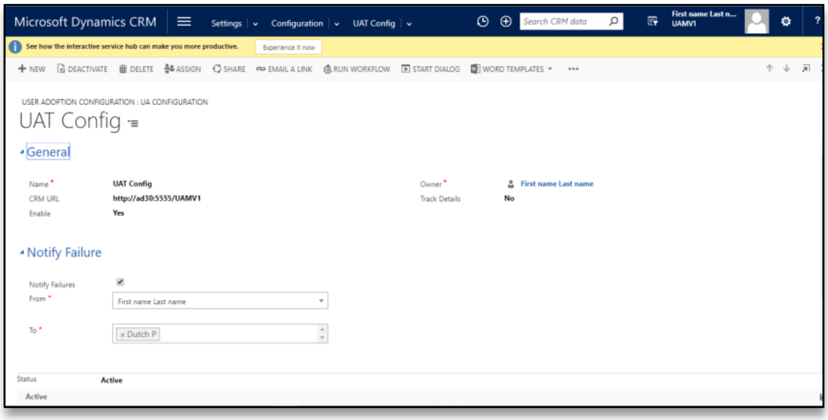
Once the User Adoption Monitor solution is installed and activated, there is already a User Adoption Configuration record created for you. In case if the record is not created or you wish to update the existing record please follow the below-mentioned steps.

- Navigate to *Settings > Configuration* (Under User Adoption Monitor Group)



- Click on (+ New) to create a new User Adoption Configuration record (*If no record is already created*).

Fill Values in this Entity



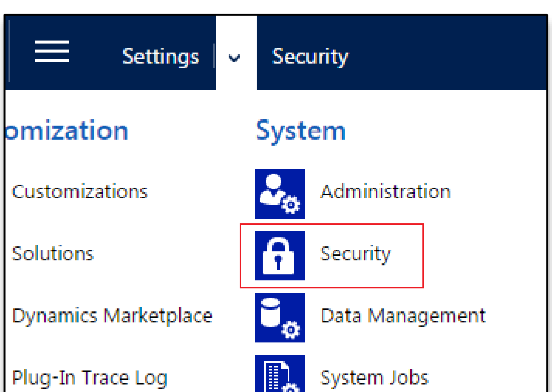
FIELD	DESCRIPTION
Enable	Choose Yes, to enable system-wide flag for monitoring user actions. To disable system-wide monitoring set this flag as No.
Track Details	You can select either Yes or No. If you choose yes, it creates Tracking Details record otherwise, it won`t create Tracking Details record. Know More.
CRM URL	CRM URL to be used to generate record links in tracking information
Notify Failures	Click on the checkbox and fill email details which will appear below. This will enable the system to track and notify the **System User-login** workflow failures to users.

Importance of Tracking Details

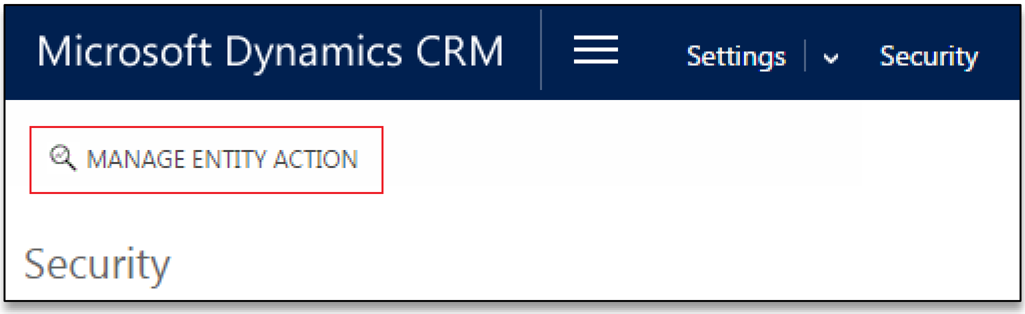
If you enable Track Details in User Adoption Configuration entity, then the tool will also store a link to the record on which the action was performed by the user.

Entity Configurations for CRUD Operations

- Navigate to *Settings > Security*.

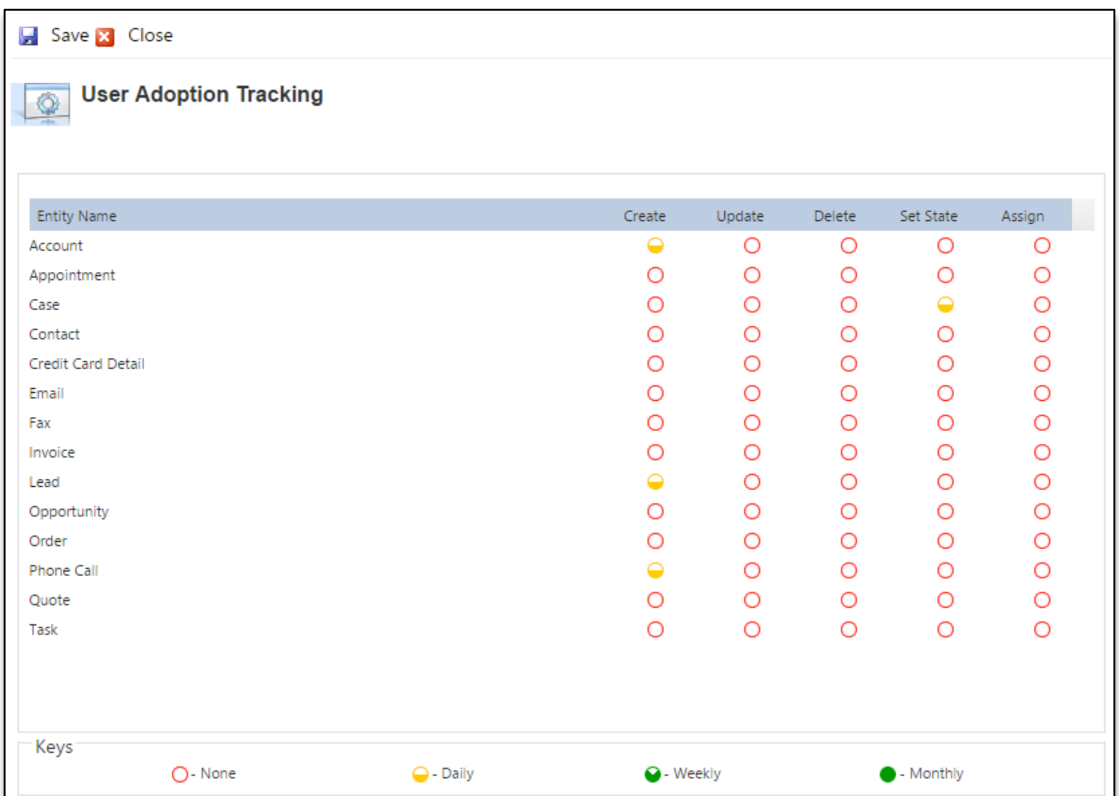


- Click on *MANAGE ENTITY ACTION* button.



Once you click the *Manage Entity Action* button, a pop-up opens listing the most commonly used OOB Entities and Activities. It also lists all the available custom entities and activities. Apart from that, it allows you to enable tracking of the most commonly performed Actions on any entity like Create, Update, Delete, etc.

Note: *Sample entity tracking configurations are shipped and installed along with the product.*



Here, you can specify, which actions need to be tracked per entity in a customized manner. To specify it, just click on the red circle (O) for the period you would like it to be tracking information to be summarized by.

Let us understand what these terms *None*, *Daily*, *Weekly,* and *Monthly* specifies;

- None	Represents tracking is not enabled at all.
- Daily	Represents changes will be tracked and summarized daily.
- Weekly	Represents changes will be tracked and summarized by the week.
- Monthly	Represents changes will be tracked and summarized by the month.

Entity Configuration for special messages

We support the following special messages apart from the CRUD operations. You will find sample entity configurations created for these when you install the sample data

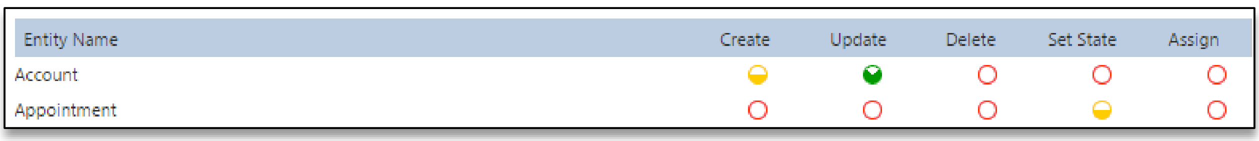
Entity Name	Message	Description
Lead	Qualifylead	This message is triggered when a lead is qualified.
Opportunity	Win	It is triggered when an opportunity is closed as Won.
Quote	Close	Triggered when the quote is closed.
Quote	Win	It is triggered when the *Create Order* button is clicked on the quote to create an order and also closing the quote.
Incident	Close	This is triggered when an Incident is closed as Resolved
List	AddMember	This is triggered when a new member is added to a Static Marketing List
Email	Send	To track the emails that are sent out of CRM

Active User Adoption Entity Configuration

Name	Entity Label	Entity Schema	Message	Period
Account-create	Account	account	create	Daily
Account-update	Account	account	update	Weekly
Appointment-setstatedynamicentity	Appointment	appointment	setstatedynamic...	Daily
Incident-setstatedynamicentity	Incident	incident	setstatedynamic...	Daily
Lead-create	Lead	lead	create	Daily
Lead-qualifylead	Lead	lead	qualifylead	Monthly
Opportunity-win	Opportunity	opportunity	win	Monthly
PhoneCall-create	PhoneCall	phonecall	create	Daily
Quote-close	Quote	quote	close	Monthly
Quote-win	Quote	quote	win	Monthly

Example for Entity Tracking

- Here we have enabled Daily tracking on Account for Create & Update actions, and for Set State on Appointment.



- Upon Save, you will be notified that the Tracking has been enabled/disabled for selected entities.

- You can verify the configurations by navigating to the Entity Configuration area of User Adoption.

Active User Adoption Entity Configuration

Name	Entity Label	Entity Schema	Message	Period
Account-create	Account	account	create	Daily
Account-update	Account	account	update	Weekly
Appointment-setstatedynamicentity	Appointment	appointment	setstatedynamic...	Daily

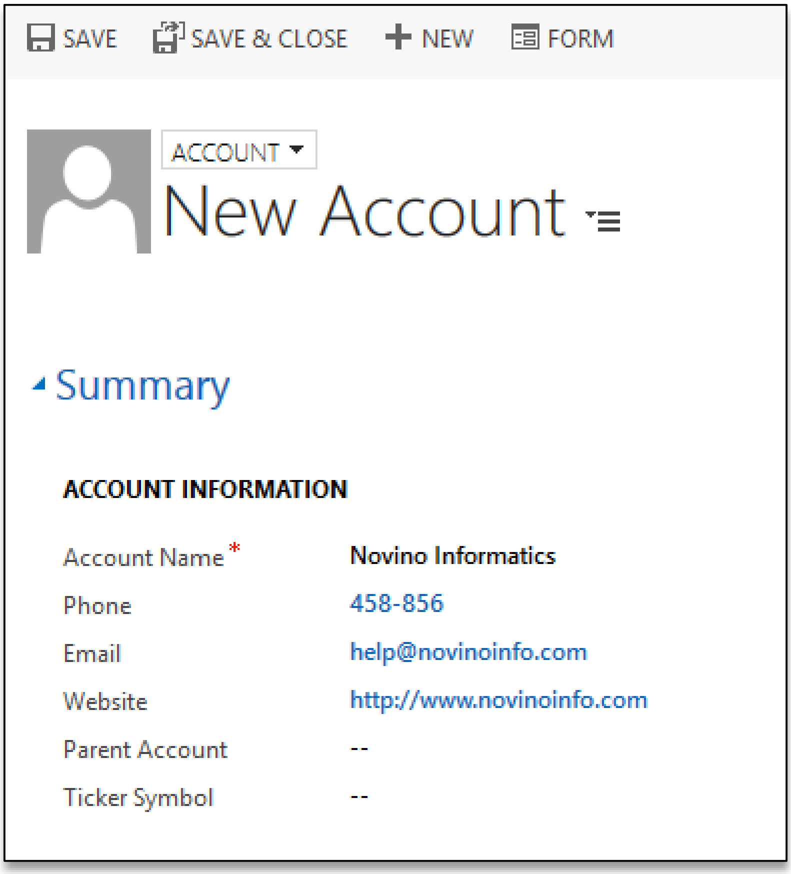
- With the configurations recorded actions like Create and Update on Account will be tracked. Every time an appointment is closed, that information will be tracked as well.

Note: *Through the User Adoption Tracking screen you can only configure to monitor CRUD operations performed on entities. To monitor other actions performed by the user on the entities you need to create the User Adoption Entity Configuration Record manually.*

Verify Tracking

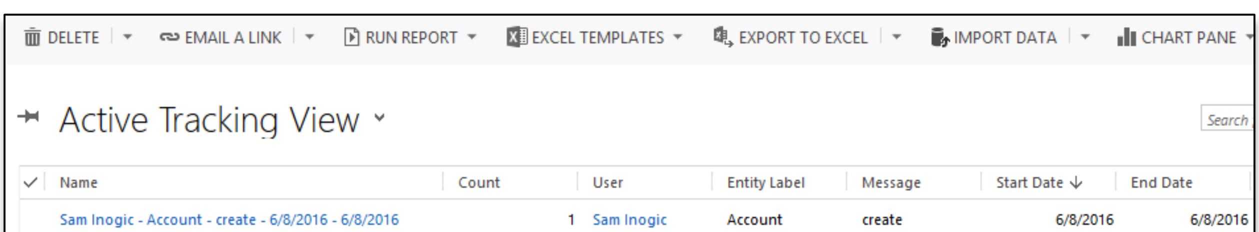
Let us go ahead and verify our entity configurations.

Add a new account

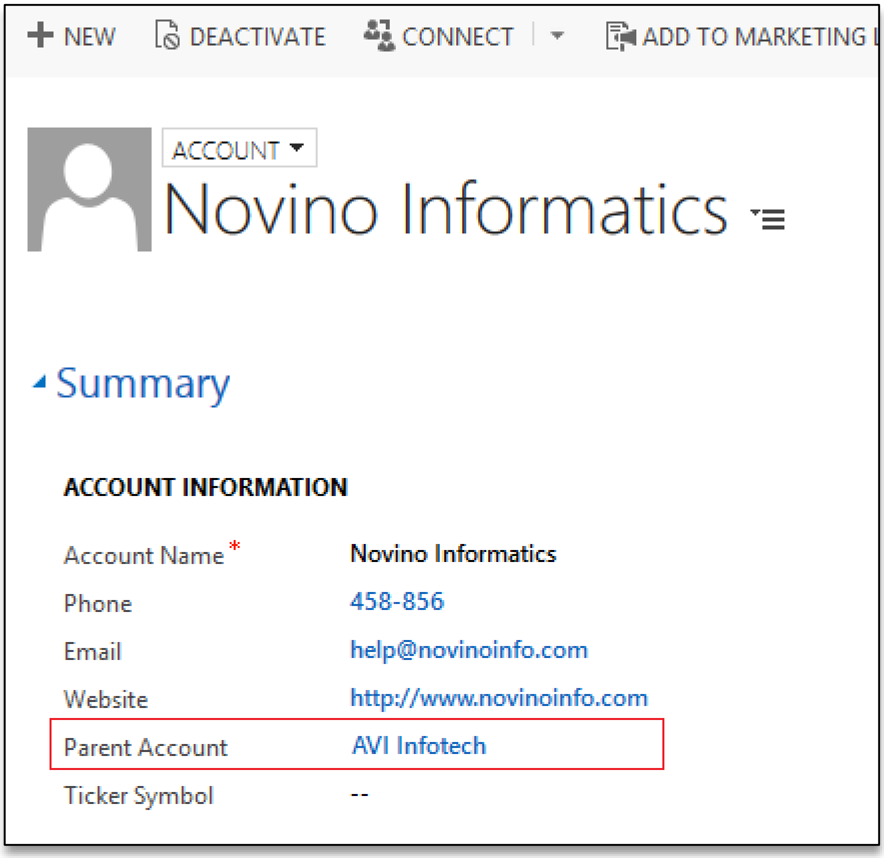


Upon save, navigate to the Tracking area of User Adoption to see the updates reflected there.

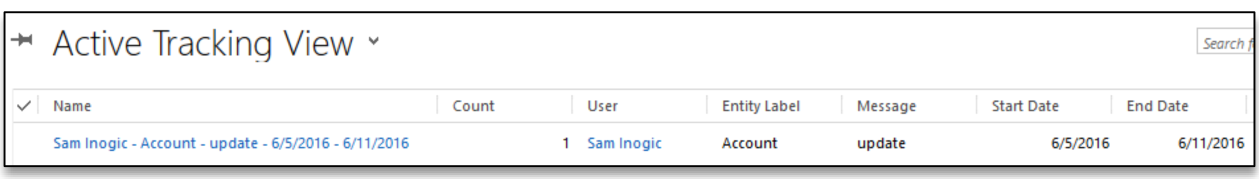
It would create a new tracking record per entity/message/period combination. Since we had selected to monitor Account creates daily, you will find one record each day per user for tracking the creates by that user for that day.



Update an account



It would create a new tracking record per entity/message/period combination. Since we had selected to monitor Account updates weekly, you will find one record per week per user for tracking the updates by that user for that week.



CRM Access Tracking

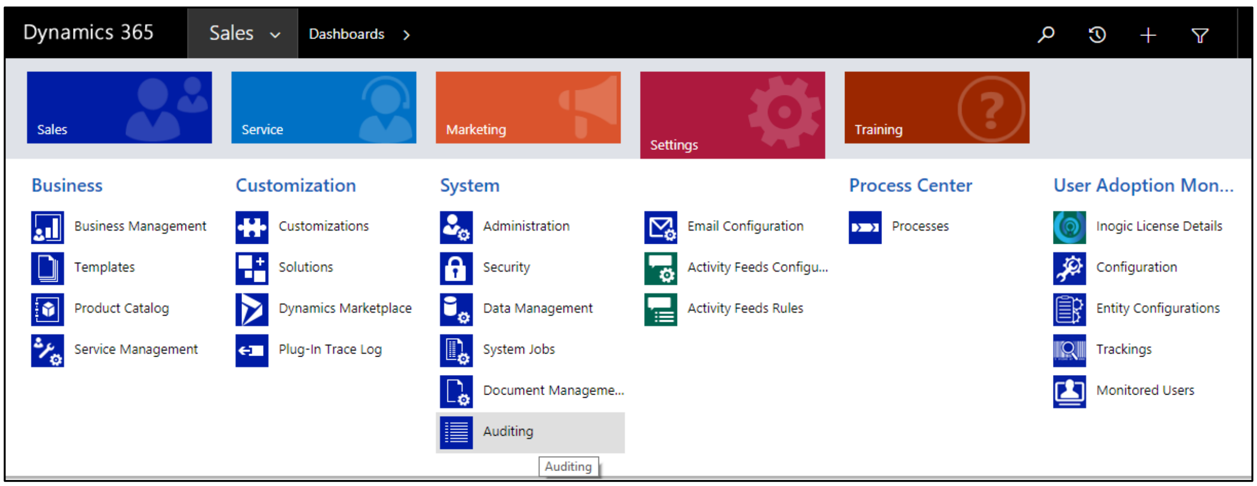
CRM Access Tracking is a feature to track access of the Dynamics CRM users. It enables the managers to monitor the CRM access of their team members by tracking various web activities performed by them in the CRM manually.

Note: This feature doesn't give the actual daily login count of a CRM user, instead provides brief details on the times a user accesses a CRM.

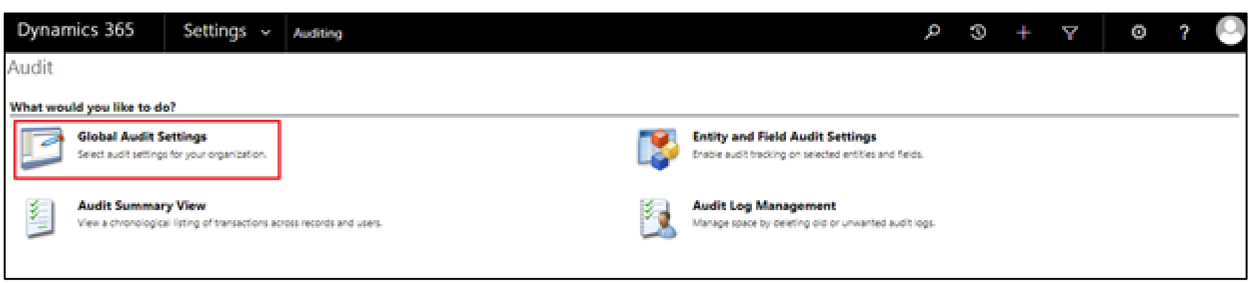
Steps to Track User's CRM Access

1. First step towards it is Enable Auditing. Please follow the below steps.

- Navigate to Settings -> Auditing (under "System" group)



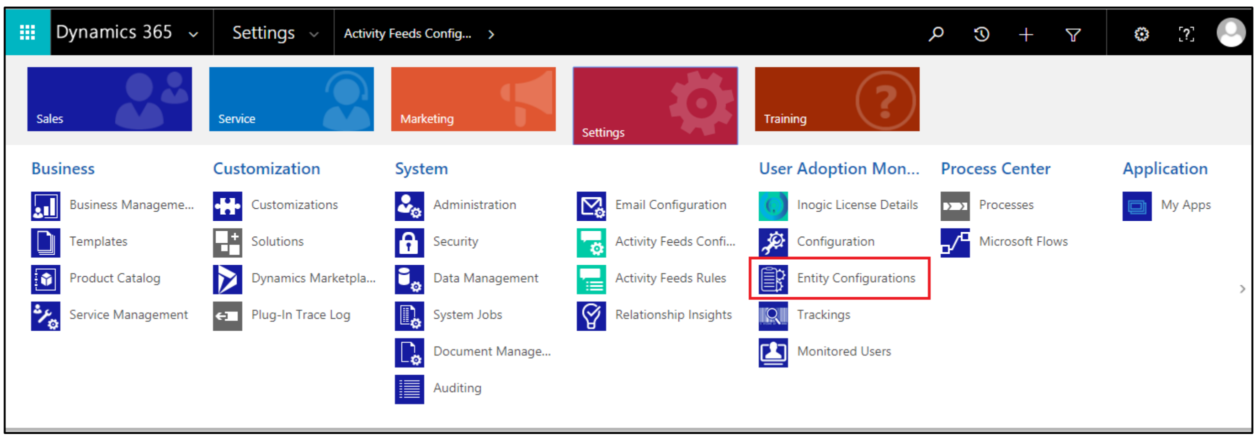
- It opens Audit window as shown below. Click on "Global Audit Settings".



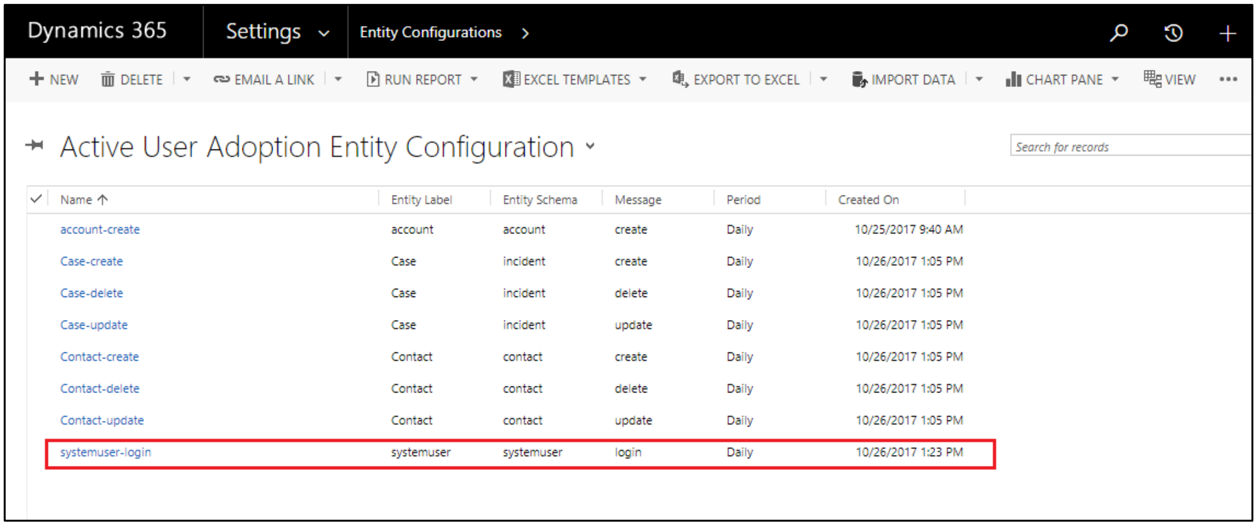
- Click on "Auditing" tab .Check "Start Auditing" and "Audit user Access" Settings as shown below.

2. Create a “User Adoption Entity Configuration” record for User Login as follows:

- Navigate to Settings -> Entity Configuration (under “User Adoption Monitor” group)

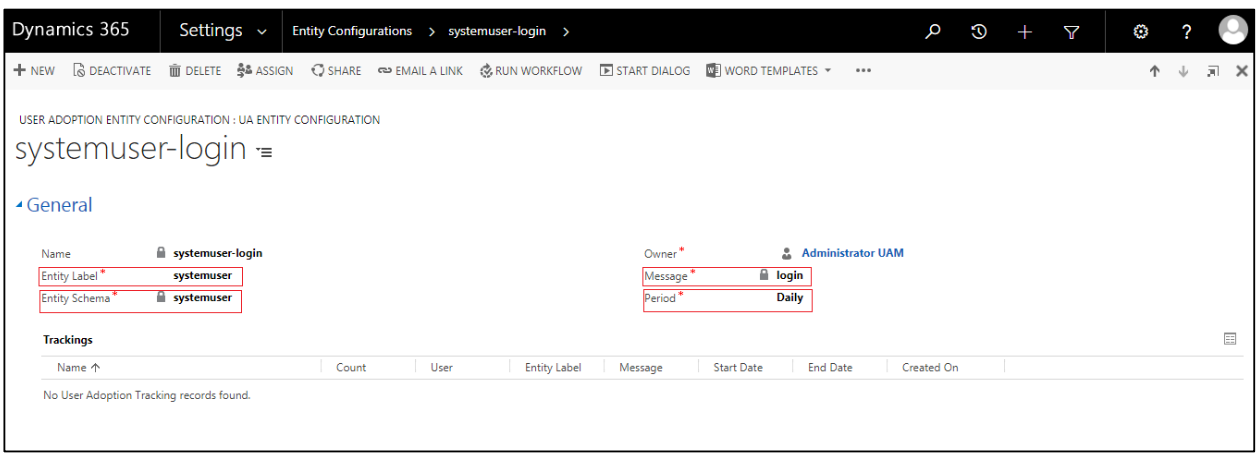


- Click on (+ New) to create a new User Adoption Entity Configuration record for login (*If no record is already created*).
  Note: Whether the entity configuration record has already been created or not, can be verified from the entity configuration home view as below



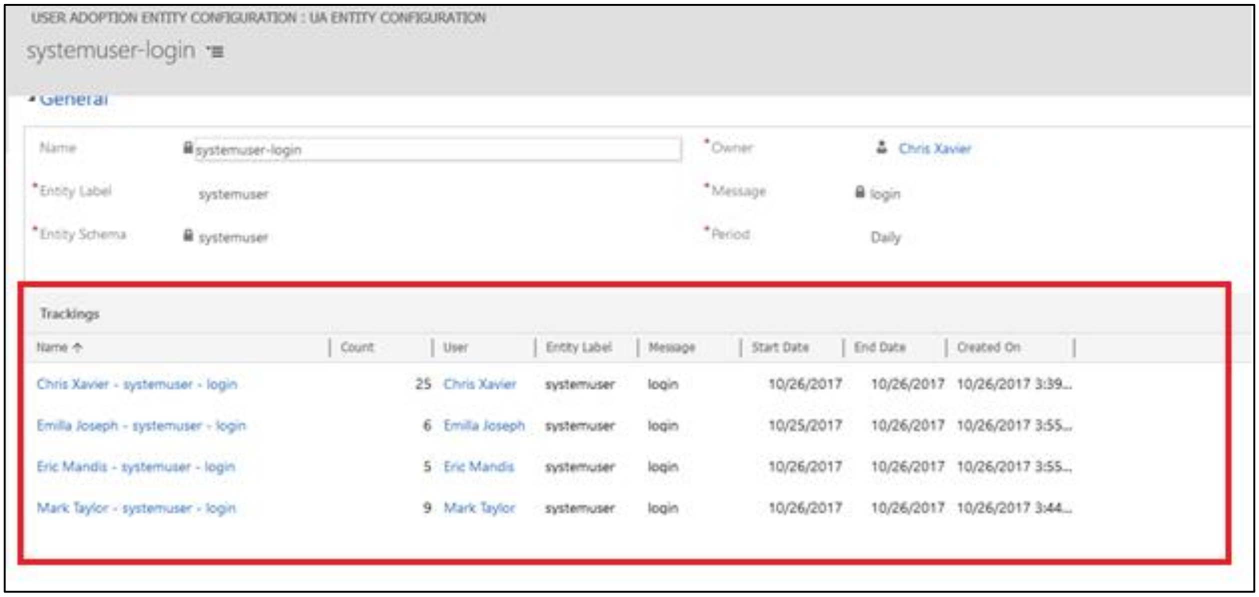
The User Adoption Entity Configuration record should always be created with the following attributes as shown in the screenshot below.

- Entity Label : : "systemuser"
- Entity Schema : : "systemuser"
- Message : : "login"
- Period : : "Daily"



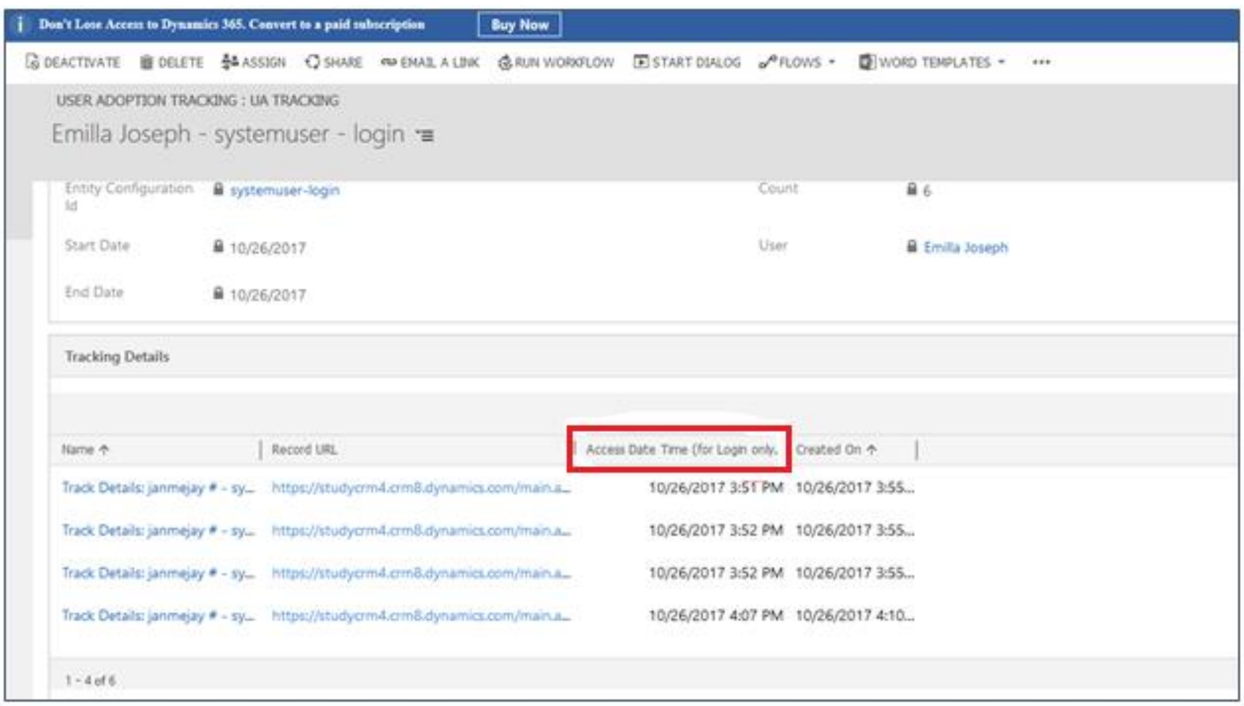
Note: The period should always be selected as "Daily" as this feature only works for daily tracking.

3. Once the Entity Configuration record is created, the User Adoption Monitor will track the CRM Access of each logged in user. The tracking details can be reviewed either from the "systemuser-login" entity configuration record as below or by navigating to the **Settings > User Adoption Monitor > Trackings**.



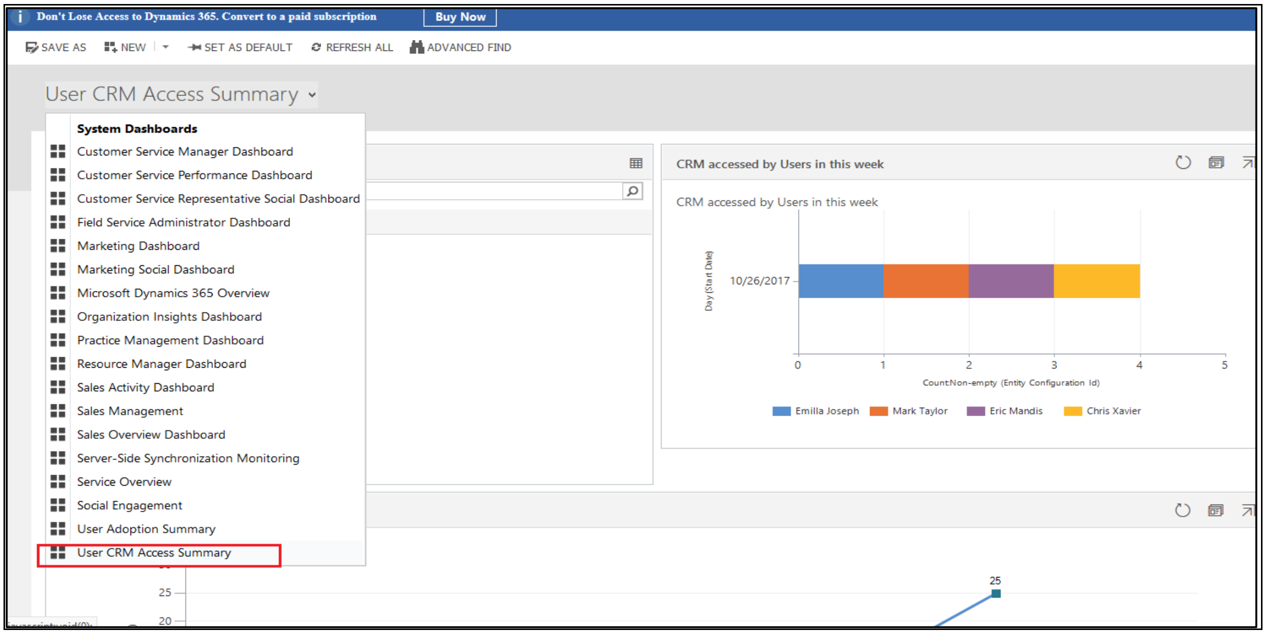
From this “Trackings” view we can find the number of times a respective users has accessed the CRM by date.

4. We can see exact time at which CRM users has accessed the CRM by opening the “Trackings” record as below.



5. User Adoption Monitor gets shipped with the “User CRM Access Summary” dashboard to view the CRM user’s access summary at a glance.

   The “User CRM Access Summary” dashboard can be viewed under the System dashboards area.



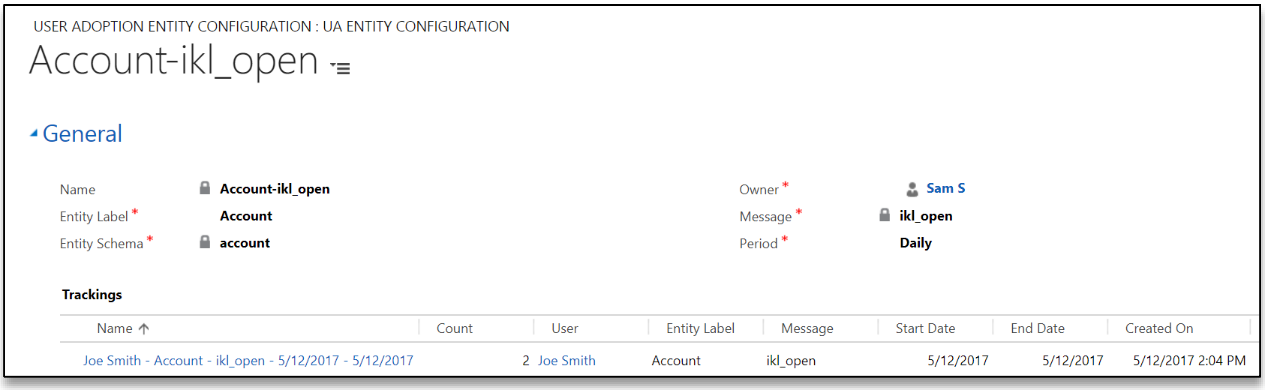
Note: This dashboard is visible to only user who has any one of the following security roles, System Administrator, System Customizer and User Adoption Monitor Administrator.

Track Opening of the Records

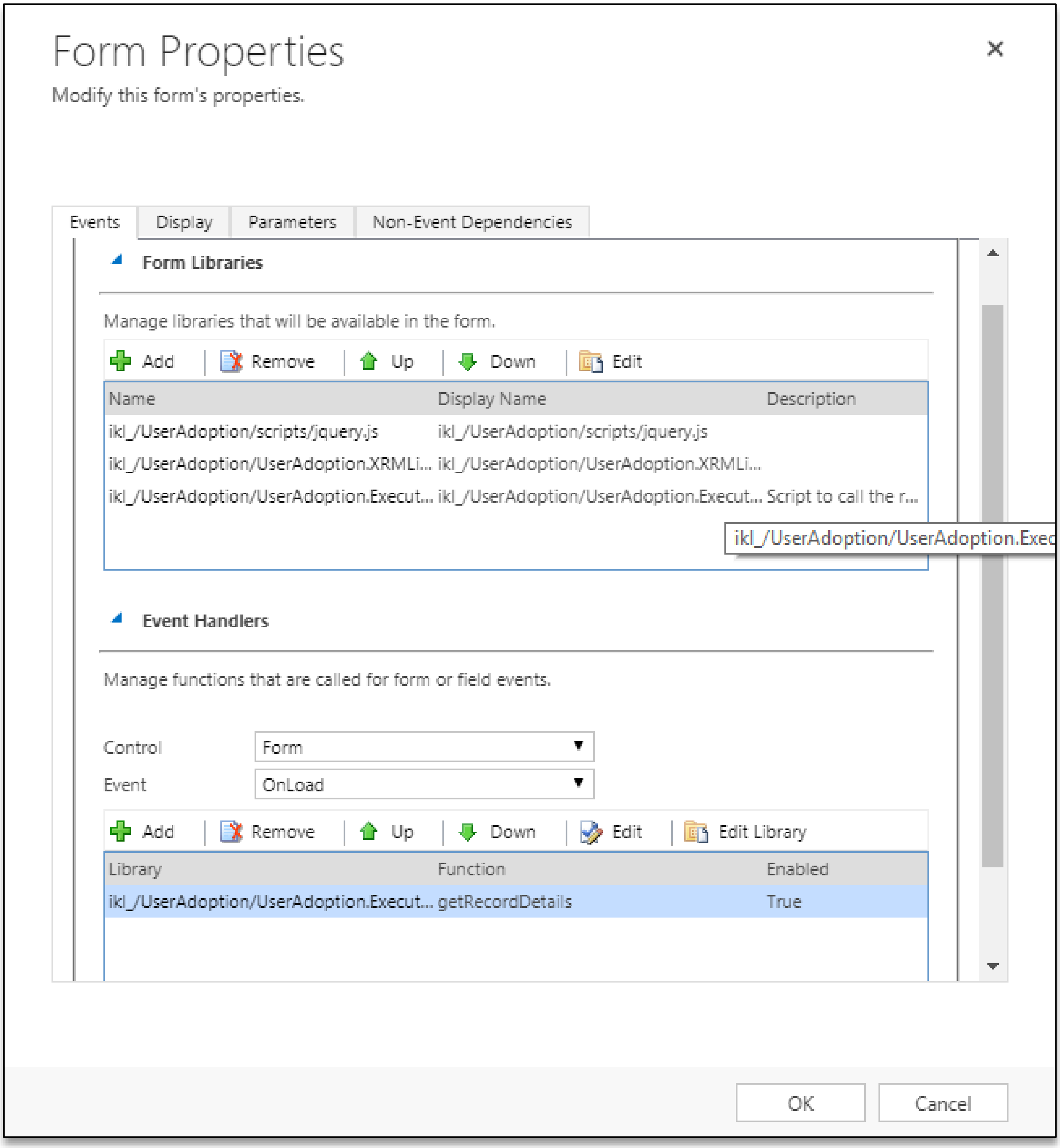
You can also track the touch of the records by tracking the opening of the records.

To track the opening of the records, certain customization is required. For example, consider a scenario where you want to track the touch/opening of the account records.

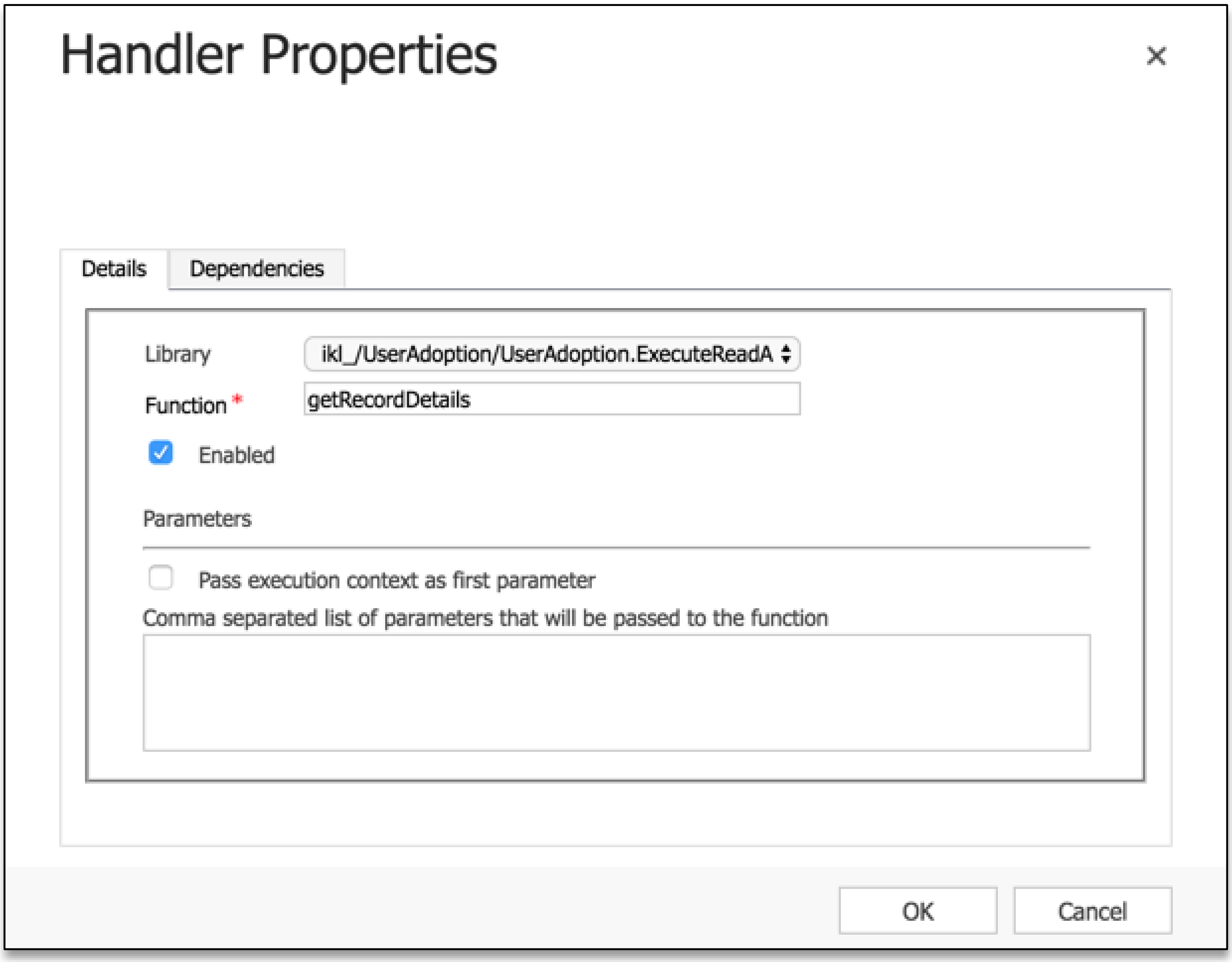
- Create a record of the User Adoption Entity Configuration Entity with the following details;
  - Entity Label : : **Account (entity on which you need track open/read)**
  - Entity Schema : : **account (schema name of the entity)**
  - Message : : **ikl_open**
  - Period : : **Daily (period you want to track)**



- Add the following User Adoption Monitor JavaScript libraries which are shipped along with the product to the 'Account' form in the same order as mentioned below;
  - **ikl_/UserAdoption/scripts/jquery.js**
  - **ikl_/UserAdoption/UserAdoption.XRMLib.js**
  - **ikl_/UserAdoption/scripts/UserAdoption.ExecuteReadAction.js**



- Then finally call the *'getRecordDetails'* function on the Form OnLoad event as shown in the above screenshot from the Java Script Library *ikl_/UserAdoption/UserAdoption.ExecuteReadAction.js* (which has already been included in the form) onload of the form and then save and publish the customizations.

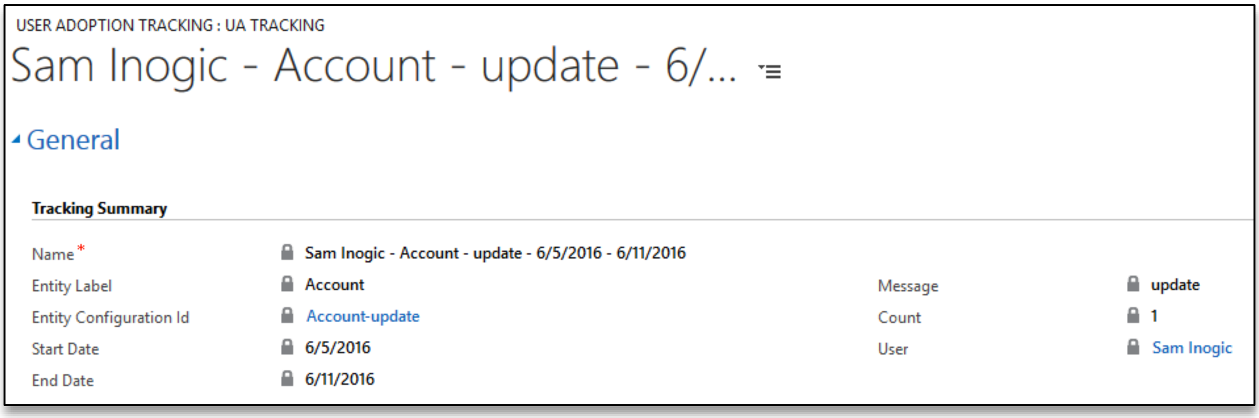


Note:

- *You need to make the above mentioned changes on each of the form being used in case you have multiple forms configured for role based access.*
- *To make the above mentioned changes one need to have the System Administrator privilege.*

Reviewing Tracking Results

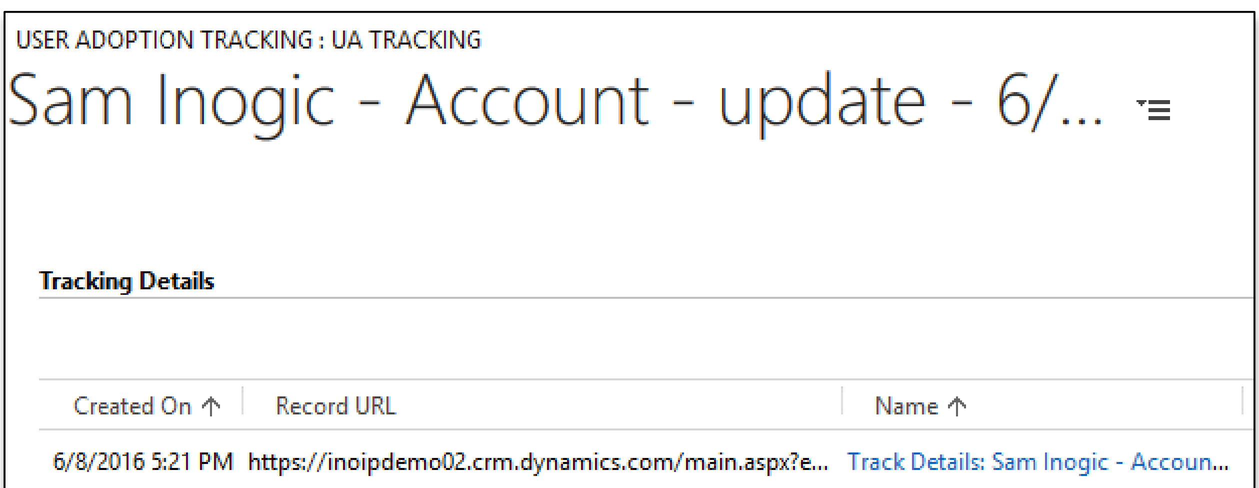
This is what a tracking record looks like;



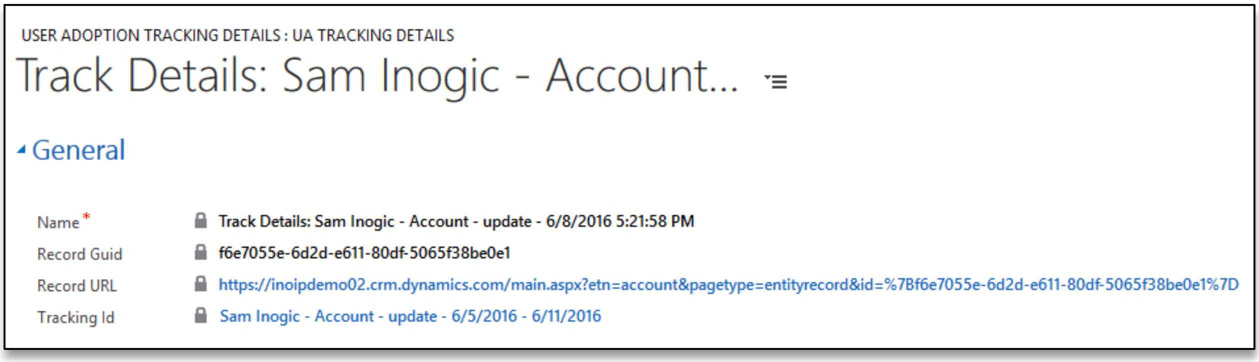
The tracking record will report on the following details of the action;

- **Entity**: Name of the entity on which action was performed.
- **Start/End Date**: This is the period for which the tracking was recorded on this record.
- **Message**: The operation being tracked.
- **Count**: The count of action being performed during this period.
- **User**: The user for whom the tracking is being maintained

If you had enabled Tracking Details as well, you should find the following details along with the tracking record.



A tracking detail record provides you with the following information;

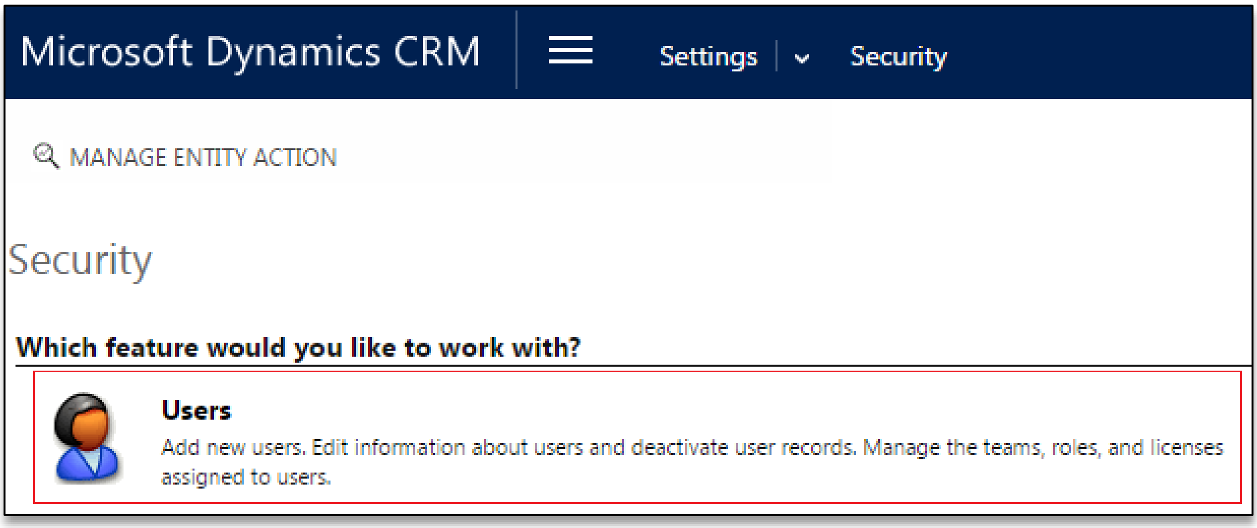


- **Record Guid**: Unique Id of the record on which the operation was performed.
- **Record URL:** Link to the record on which the operation was performed. You can click on the link to navigate to the record being tracked.

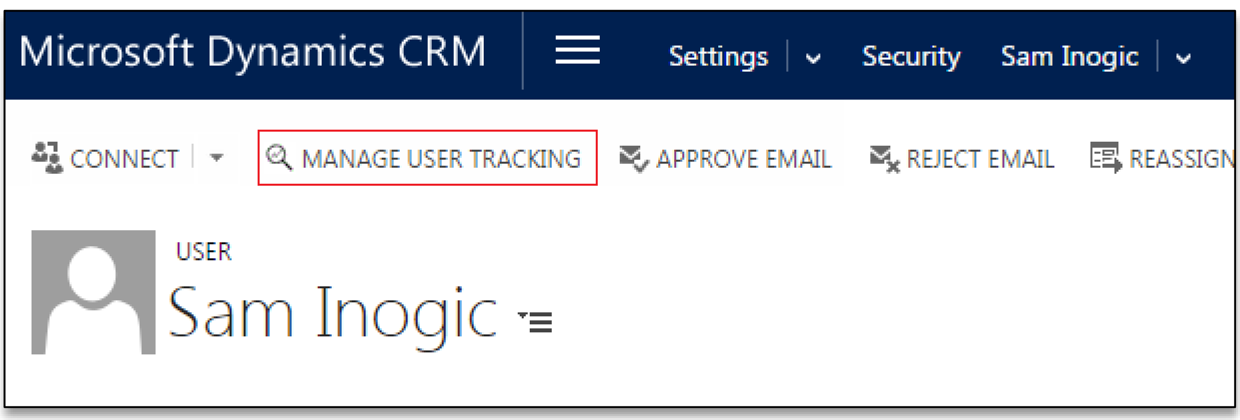
Control User Level Tracking

We have the flexibility to control actions being tracked at the individual user level as well.

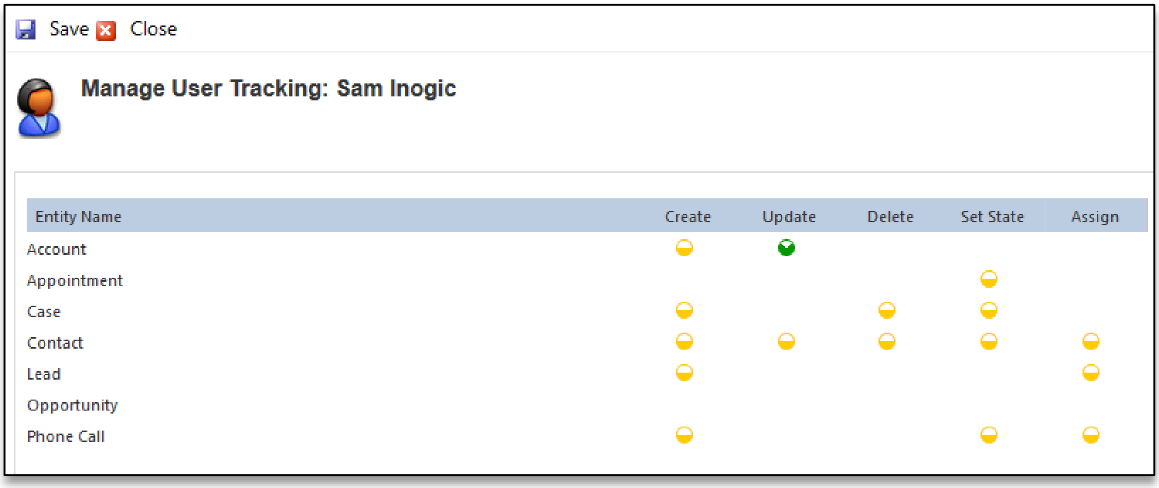
- Navigate to *Settings* > *Security* > *Users*.



- Open a User's record, and then click *MANAGE USER TRACKING*.



- It will open a pop-up as shown below.



- The configuration UI at User Level would only list down those entities and actions, which are enabled at System Level.

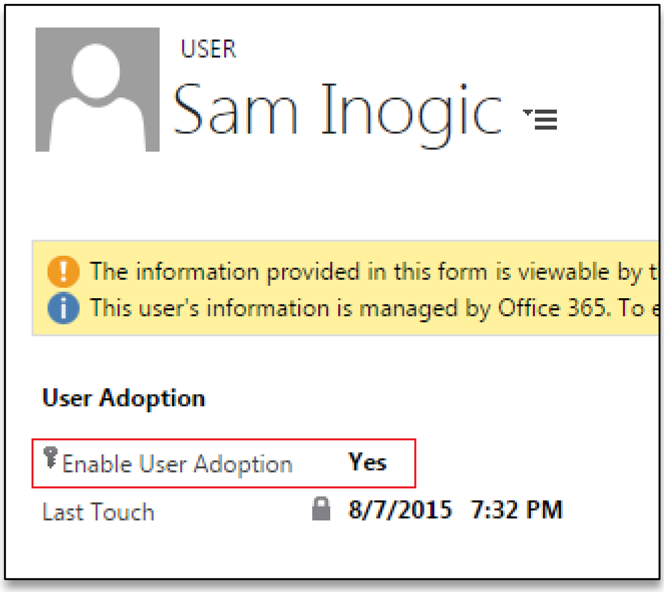
> ***Note:*** *For opportunity, we have enabled Win message/action, and since it is not available as a message/action in the UI, Opportunity will be listed here, but no options against it will be available.*

- In the UI, you are just allowed to select between two values for any action, the one which is selected at the System Level and the other as None
- For this scenario, you can just select between - Daily or - None .

> ***Note:*** *Customizing tracking capability of a particular user will end the synchronization with the System Level configurations. This means if you customize a user's tracking capability, and later on, you enable tracking for an entity under Create action at System Level, then it will not take effect for that user. For a user to Sync with System Level configurations again, you need to delete all of the modifications done for that user.*

Control Tracking for a User Globally

On the System Users form, we have a section called User Adoption where you can define whether to enable the User Adoption tracking for a user or not.

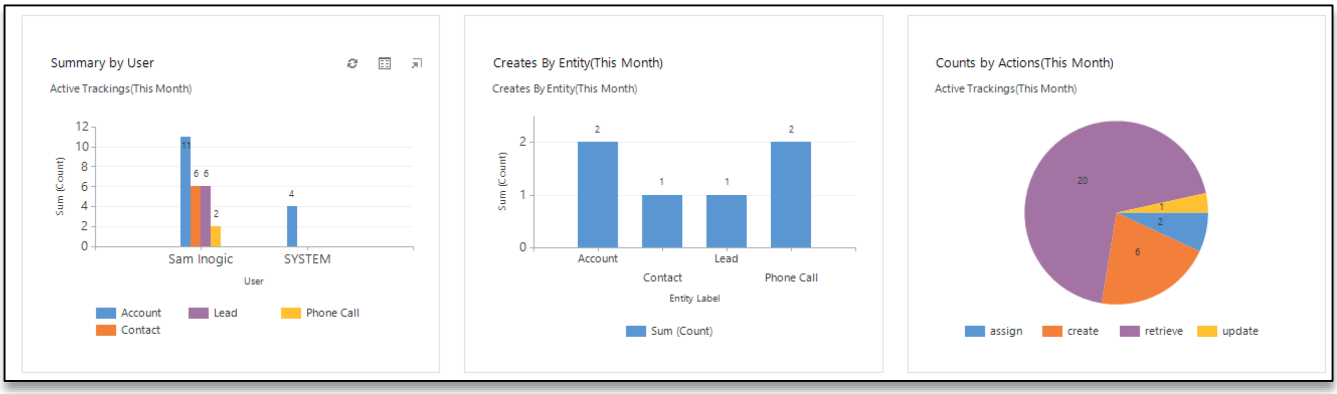


Set the *Enable User Adoption* to *No* to not track any actions of this user.

Last Touch would show the last date any action for this user was tracked.

User Adoption Monitor Benefits

- User Adoption Monitor can be very helpful for managers to track the activities of users in their team.
- Dashboards with charts can be used to show the actions performed by all users at one place. For a reference, we have created a dashboard named "User Adoption Summary" with multiple charts showing how powerful tracking can be using User Adoption.



- Reports can be generated defining the work done by users based on tracking done for actions performed for respective entities.

Contact Us

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