



# User Adoption Monitor



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# User Adoption Monitor - White Paper

## Aim:

Enable managers to monitor the actions of team members with respect to using Dynamics CRM for their day to day operation and not with the intent of monitoring what exact data was entered by the user

## 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 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
- Track user Log-in & Log-out details
- Track amount of time spent by user on particular Entity records

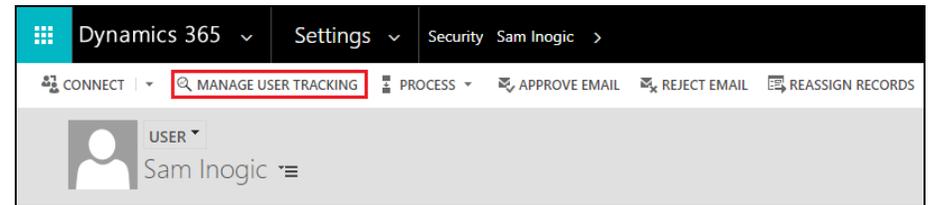
## Supported Versions

**Versions:** Dynamics 365 8.2 and above, Power Apps & CDS.

**Deployment Models:** On-Premise and Online.

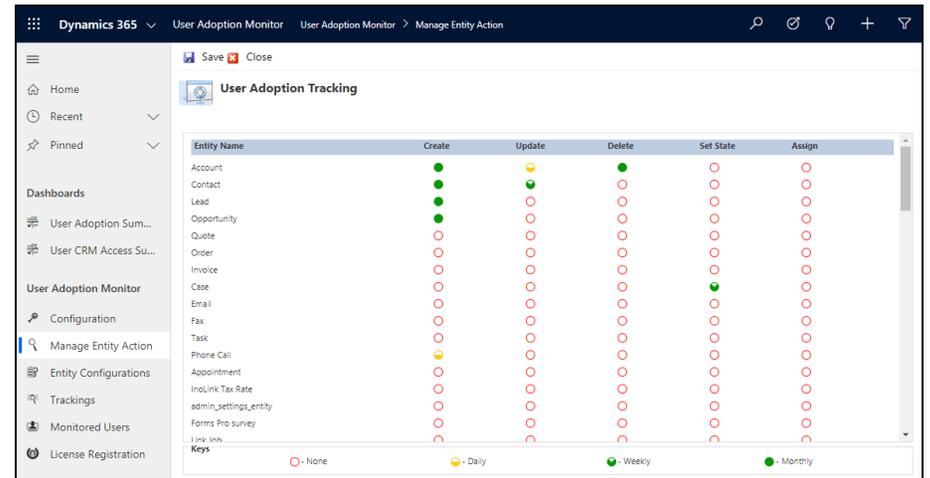
## Ease of Access:

A new button will be available in the Security Settings area of Dynamics CRM



## User Adoption User Interface:

User Adoption tracking settings can be done from Security. Here the Managers can configure the entities and operation that need to be monitored. You choose the period based on which the results need to be summarized. The tracking can be set for daily, weekly or monthly basis.



## Log-in & Log-out

Track Log-in & Log-out details of each user in Dynamics 365 CRM on daily basis.

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USER ADOPTION ENTITY CONFIGURATION  
Application-loginlogout

General Related

Name	Application-loginlogout	Owner	Sam Inogic
Entity Label	Application	Message	loginlogout
Entity Schema	application	Period	Daily

Trackings

Name	Count	User	Entity ...	Message	Start D...	End Da...	Created On
Sam Inogic - Application - loginlogout	3	Sam Inogic	Application	loginlogout	10/22/2019	10/22/2019	10/22/2019 8:...

## Check-in & Check-out

Keep track of time spent by each user on particular Entity records.

USER ADOPTION ENTITY CONFIGURATION  
Case-checkincheckout

General Related

Name	Case-checkincheckout	Owner	Sam Inogic
Entity Label	Case	Message	checkincheckout
Entity Schema	Incident	Period	Daily

Trackings

Name	Count	User	Entity ...	Message	Start D...	End Da...	Created On
Sam Inogic - Case - checkincheckout	4	Sam Inogic	Case	checkinch...	10/22/2019	10/22/2019	10/22/2019 9:...

## Monitor User Adoption:

Managers can configure the user actions in Dynamics CRM that need to be monitored by the tool. You can set rules specific to individual users to monitor as well.

Save Close

Manage User Tracking: Sam Inogic

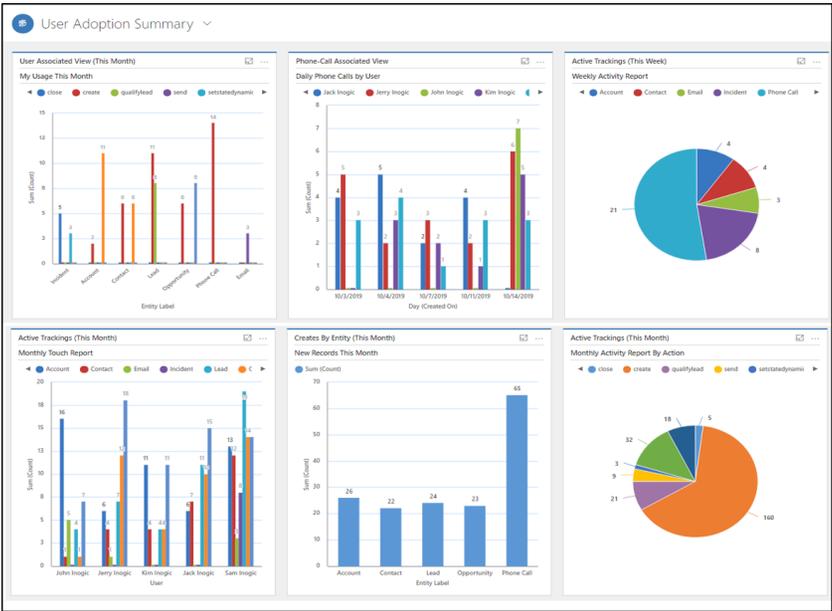
Entity Name	Create	Update	Delete	Set State	Assign
Account	●	●	●		
Lead	●				
Opportunity	●				
Incident					
Email					
Contact	●	●			
Case				●	
Phone Call	●				

Keys: ○ - None   ● - Daily   ● - Weekly   ● - Monthly

## Review results on Dashboard

The monitoring results are stored in easy to report formats. Quickly design charts and have it up on your dashboard.

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