



User Adoption Monitor



User Manual

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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 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

Available for:-

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

Deployment: On-Premises and Online.

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.

You need to have **User Adoption Monitor Administrator** or **User Adoption Monitor User** role to access the features of User Adoption Monitor solution.

For further installation instructions, refer to the *Installation Guide*, if you don't have one, ask your vendor for it.

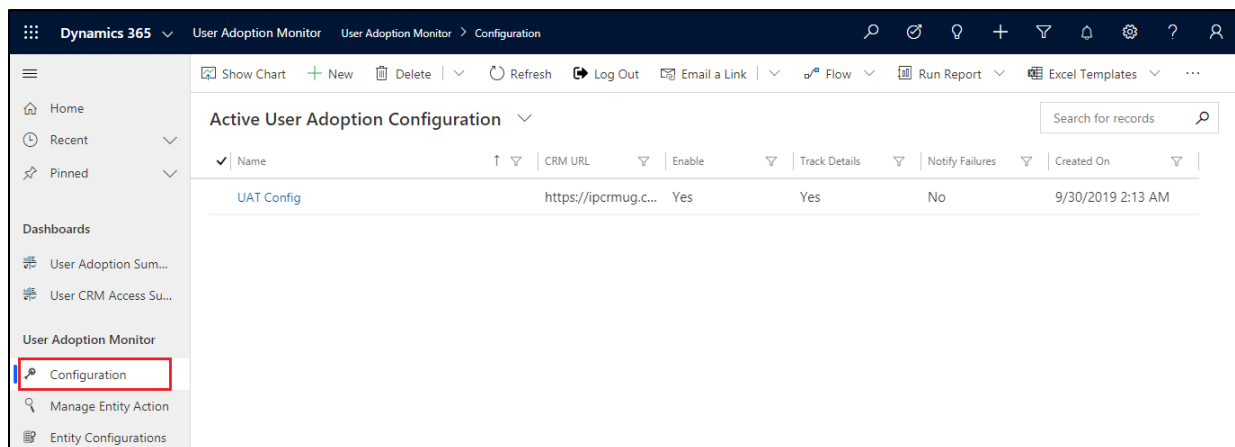
Getting Started

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 *User Adoption Monitor App > Configuration*




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

Fill Values in this Entity

UAT Config
User Adoption Configuration

General Notify Failure Notes Related

Name *	UAT Config	Owner *	 Sam Inogic
CRM URL	https://ipcrmug.crm.dynamics.com	Track Details	Yes
Enable	Yes		

UAT Config
User Adoption Configuration

General Notify Failure Notes Related

Notify Failures ☒

From *

To *

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 *User Adoption Monitor App > Manage Entity Action*. 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.





The screenshot displays the 'Manage Entity Action' configuration window in Dynamics 365. The window title is 'User Adoption Tracking'. It features a table with the following columns: Entity Name, Create, Update, Delete, Set State, and Assign. The table lists various entities such as Account, Contact, Lead, Opportunity, Quote, Order, Invoice, Case, Email, Fax, Task, Phone Call, Appointment, InoLink Tax Rate, admin_settings_entity, Forms Pro survey, and Link Inh. Each entity has corresponding colored circles in the action columns. A legend at the bottom indicates the meaning of the colors: Red circle for 'None', Yellow circle for 'Daily', Green circle for 'Weekly', and Dark Green circle for 'Monthly'. The 'Manage Entity Action' option in the left-hand navigation pane is highlighted with a red rectangular box.

Entity Name	Create	Update	Delete	Set State	Assign
Account	Green	Yellow	Green	Red	Red
Contact	Green	Green	Red	Red	Red
Lead	Green	Red	Red	Red	Red
Opportunity	Green	Red	Red	Red	Red
Quote	Red	Red	Red	Red	Red
Order	Red	Red	Red	Red	Red
Invoice	Red	Red	Red	Red	Red
Case	Red	Red	Red	Green	Red
Email	Red	Red	Red	Red	Red
Fax	Red	Red	Red	Red	Red
Task	Red	Red	Red	Red	Red
Phone Call	Yellow	Red	Red	Red	Red
Appointment	Red	Red	Red	Red	Red
InoLink Tax Rate	Red	Red	Red	Red	Red
admin_settings_entity	Red	Red	Red	Red	Red
Forms Pro survey	Red	Red	Red	Red	Red
Link Inh	Red	Red	Red	Red	Red

Keys: Red circle - None Yellow circle - Daily Green circle - Weekly Dark Green circle - Monthly

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 (○) 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 <i>Create Order</i> 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
Application	loginlogout	To track user log-in & log-out details
Case	* checkincheckout	To keep track of user Check-in & Check-out activity details in particular Entity records

(* checkincheckout is applicable to OOB and custom entities – Lead, Opportunity, Quote, etc.)

User Adoption Monitor - User Manual

The screenshot shows the Dynamics 365 User Adoption Monitor interface. The left sidebar contains navigation options: Home, Recent, Pinned, Dashboards, User Adoption Sum..., User CRM Access Su..., User Adoption Monitor, Configuration, Manage Entity Action, Entity Configurations (highlighted), Trackings, Monitored Users, and License Registration. The main area displays the 'Active User Adoption Entity Configuration' table with columns: Name, Entity Label, Entity Schema, Message, Period, and Created On. The table lists various actions for different entities, such as 'Account-checkincheckout', 'Account-create', 'Account-delete', 'Account-update', 'Application-loginlogout', 'Case-checkincheckout', 'Case-setstatedynamicentity', 'Contact-create', 'Contact-update', and 'Email-send'.

Name	Entity Label	Entity Schema	Message	Period	Created On
Account-checkincheckout	Account	account	checkincheckout	Daily	10/22/2019 10:18 AM
Account-create	Account	account	create	Monthly	9/30/2019 2:15 AM
Account-delete	Account	account	delete	Monthly	10/30/2019 11:13 AM
Account-update	Account	account	update	Daily	10/4/2019 10:03 AM
Application-loginlogout	Application	application	loginlogout	Daily	10/22/2019 8:00 AM
Case-checkincheckout	Case	incident	checkincheckout	Daily	10/22/2019 8:59 AM
Case-setstatedynamicentity	Case	incident	setstatedynamic...	Weekly	10/22/2019 7:57 AM
Contact-create	Contact	contact	create	Monthly	10/22/2019 7:57 AM
Contact-update	Contact	contact	update	Weekly	10/22/2019 7:57 AM
Email-send	Email	email	send	Daily	9/30/2019 2:15 AM

Example for Entity Tracking

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

Entity Name	Create	Update	Delete	Set State	Assign
Account					
Contact					
Lead					
Opportunity					
Quote					
Order					
Invoice					
Case					
Email					
Fax					
Task					
Phone Call					
Appointment					
InoLink Tax Rate					

- 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 Sch...	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.

Log-in & Log-out Entity Configuration

Note: User Adoption Monitor Administrator or User Adoption Monitor User role is necessary to access Log-in/Log-out button.

With this feature you can keep track of log-in and log-out details for every user on a daily basis. It will specify the time spent by each user in Dynamics CRM system. To enable this feature, follow the steps given below:

- Navigate to Entity Configurations (User Adoption Monitor group), click on New.




USER ADOPTION ENTITY CONFIGURATION

New User Adoption Entity Configur...

General

Name

Owner

*  Sam Inogic

Entity Label

* ---

Message

* ---

Entity Schema

* ---

Period

* ---

- Here, fill the fields as follows:
 - **Entity Label:** *Application*
 - **Message:** *loginlogout* (Once the message field id filled, Entity Schema & Period field will be auto populated)
- Click on Save.

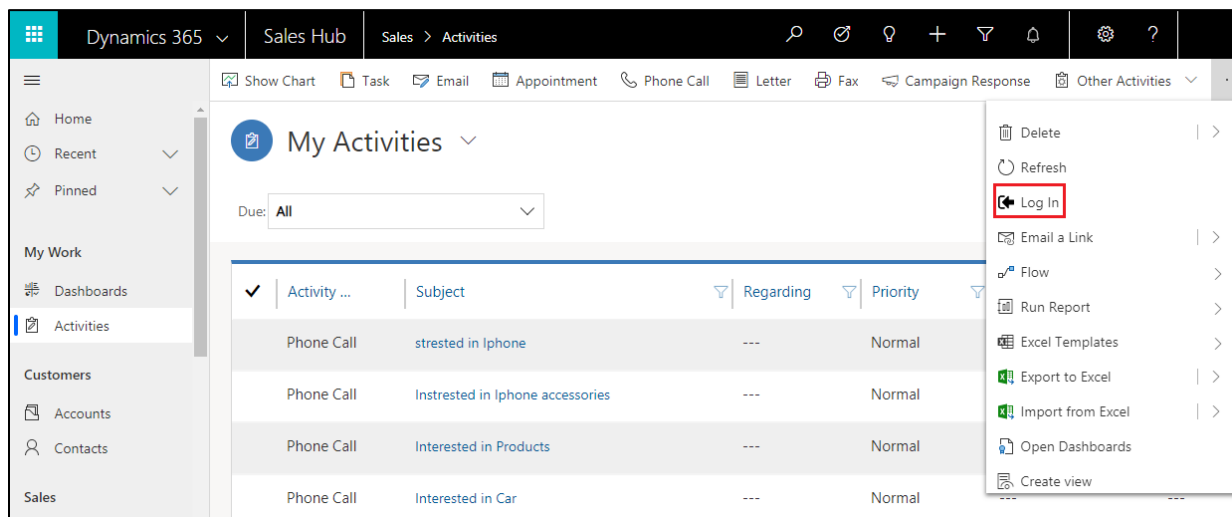
USER ADOPTION ENTITY CONFIGURATION

Application-loginlogout

General Related

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

- After entity configuration, the Log-in button will be displayed on the home grid.



- Click on Log-in button as soon as you login to your CRM account. Once the activities are completed click on Log-out button. The Log-in/Log-out button interchanges as you click on it.

User Adoption Monitor - User Manual

The screenshot shows the Dynamics 365 Sales Hub interface. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, and Contacts. The main area displays 'My Activities' with a table of activities. A context menu is open over the table, and the 'Log Out' option is highlighted with a red box.

Activity ...	Subject	Regarding	Priority
Phone Call	strested in Iphone	---	Normal
Phone Call	Instrested in Iphone accessories	---	Normal
Phone Call	Interested in Products	---	Normal
Phone Call	Interested in Car	---	Normal

- Next go to Entity Configurations (User Adoption Monitor group) → Application-loginlogout. Here, you can view associate Tracking records per user.

The screenshot shows the 'USER ADOPTION ENTITY CONFIGURATION' page for 'Application-loginlogout'. The 'General' tab is selected, displaying entity details and a table of tracking records. One record is highlighted with a red box.

Name	Application-loginlogout	Owner	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:...			

- Click on the respective record to get in depth Log-in/Log-out Tracking Detail records.

The screenshot shows the 'Tracking Details' page for the selected record. It displays a table of login/logout records for Sam Inogic.

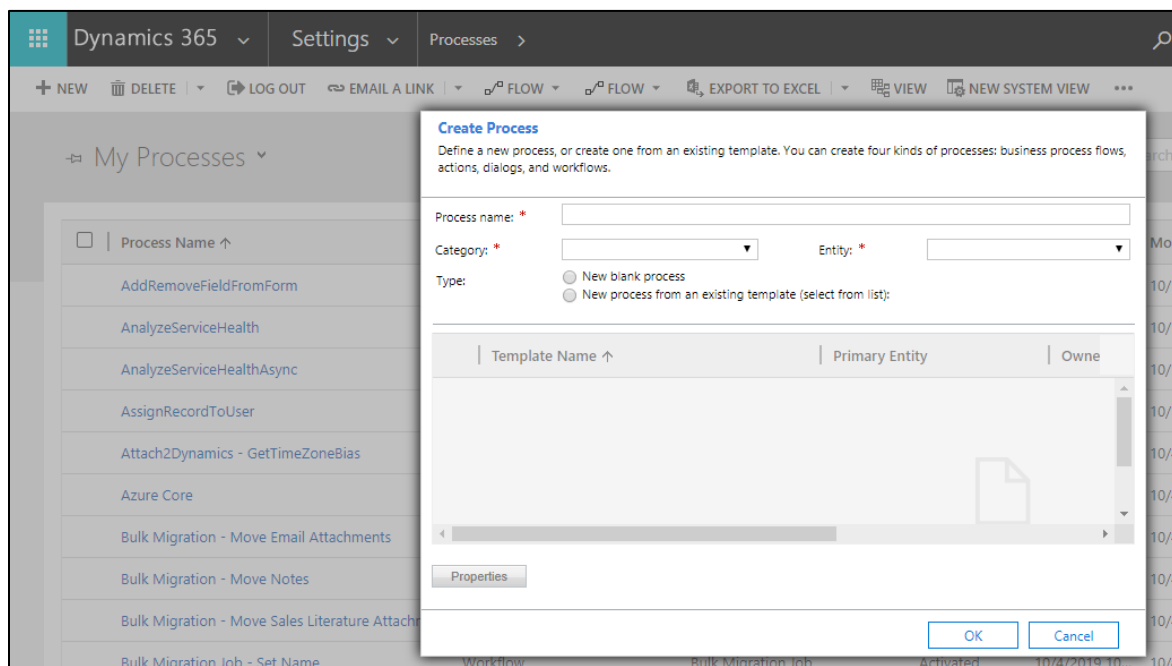
Name	Record URL	Access Date Time (for Lo...	Status Re...	Created On
Track Details: Sam Inogic - Applic	https://ipcrmug.crm.dynamics.com/main.aspx?etn	---	Login	10/22/2019 8:04...
Track Details: Sam Inogic - Applic	https://ipcrmug.crm.dynamics.com/main.aspx?etn	---	Logout	10/22/2019 8:04...
Track Details: Sam Inogic - Applic	https://ipcrmug.crm.dynamics.com/main.aspx?etn	---	Login	10/22/2019 8:06...

Check-in & Check-out Entity Configuration

Note: User Adoption Monitor Administrator or User Adoption Monitor User role is necessary to access Check-in/Check-out button.

With this feature you can keep track of records that each user worked on. It will specify the time spent by user on records in a particular Entity. In order to enable Check-in & Check-out feature for a particular entity, follow the steps given below:

- First, you have to create action for the required entity. For each entity, you have to create separate actions. Go to Advanced Settings → Settings → Processes. Click on New.



- Next, fill the required fields as follows:
 - Process name:** Name the process, for e.g. UAM-Case-CheckInCheckOut
 - Category:** Select 'Action'
 - Entity:** Select the required entity. Here 'Case' entity is selected
- Once the details are filled, click on Ok. Then 'Activate' the action as shown below:

PowerApps

File Save and Close Activate Show Dependencies Solution Layers Actions

Process: UAM-Case-CheckinCheckOut Working on solution: Default Sol

Information

Common

- Information
- Audit History
- Notify Workflow Failure
- User Adoption Entity ...
- Solution Health Rules
- Solution Health Rules

Process Sessions

- Process Sessions

General Administration Notes

Hide Process Properties

Process Name * UAM-Case-CheckinCheckOut

Unique Name * new_UAMCaseCheckinCheckOut

Entity Case

Category Action

Activate As Process

Available to Run

☐ As a Business Process Flow action step

Workflow Log Retention

☒ Keep logs for workflow jobs that encountered errors

Hide Process Arguments

Name	Type	Required	Direction

Name * Type * Entity

- Now, go to Entity Configurations (User Adoption Monitor group). Click on New.

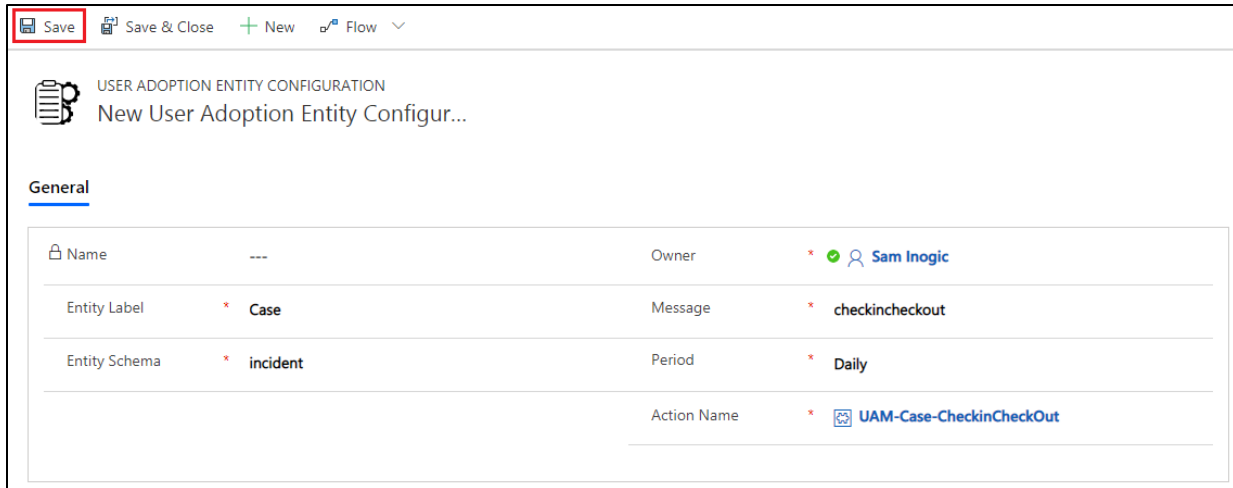
USER ADOPTION ENTITY CONFIGURATION

New User Adoption Entity Configur...

General

Name	---	Owner	* Sam Inogic
Entity Label	* ---	Message	* ---
Entity Schema	* ---	Period	* ---

- Fill the required fields as follows:
 - Entity Label:** Give name of required entity. For e.g. Case
 - Message:** *checkincheckout*. (After populating this field, you will get another lookup field – Action Name)
 - Entity Schema:** case
 - Period:** Select period i.e. Daily, Weekly or Monthly
 - Action Name:** Select the action created, for e.g. UAM-Case-CheckInCheckOut
- Click on Save.



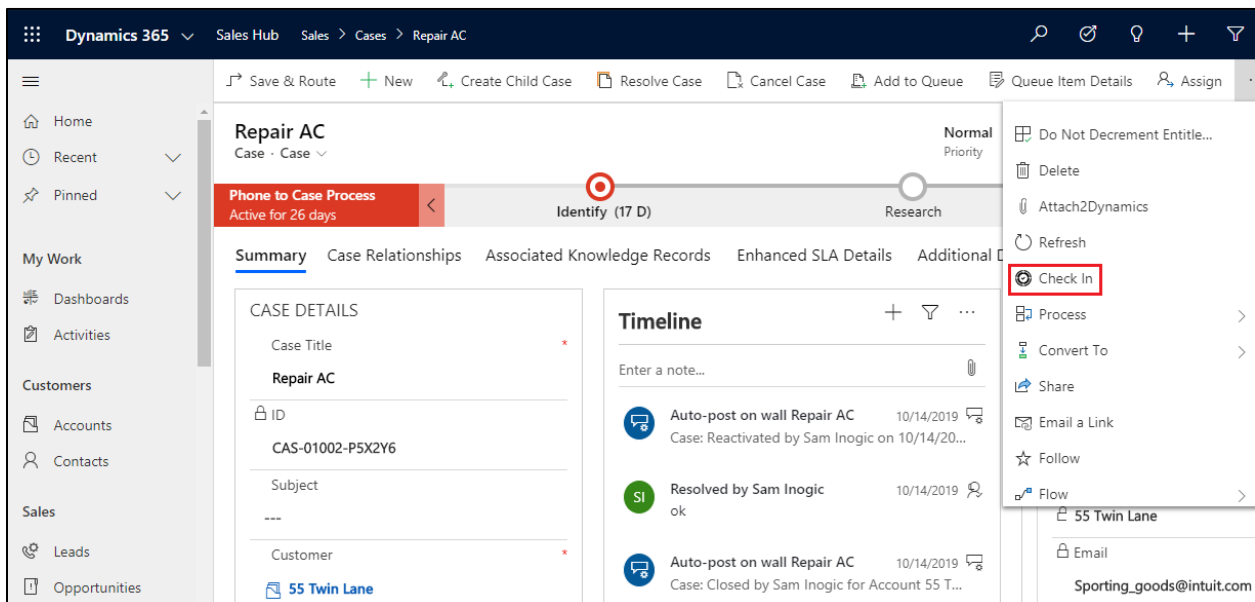
Save Save & Close + New Flow

USER ADOPTION ENTITY CONFIGURATION
New User Adoption Entity Configur...

General

Name	---	Owner	* Sam Inogic
Entity Label	* Case	Message	* checkincheckout
Entity Schema	* incident	Period	* Daily
		Action Name	* UAM-Case-CheckinCheckOut

- Now go to a particular record in Case entity. Here, you will see the Check-in button. Click on the same before doing any task on that particular record.



Dynamics 365 Sales Hub Sales > Cases > Repair AC

Save & Route + New Create Child Case Resolve Case Cancel Case Add to Queue Queue Item Details Assign

Repair AC Case · Case Normal Priority

Phone to Case Process Active for 26 days Identify (17 D) Research

Summary Case Relationships Associated Knowledge Records Enhanced SLA Details Additional

CASE DETAILS

Case Title Repair AC

ID CAS-01002-P5X2Y6

Subject

Customer 55 Twin Lane

Timeline

Enter a note...

- Auto-post on wall Repair AC 10/14/2019 Case: Reactivated by Sam Inogic on 10/14/20...
- Resolved by Sam Inogic ok 10/14/2019
- Auto-post on wall Repair AC 10/14/2019 Case: Closed by Sam Inogic for Account 55 T...

Check In

Do Not Decrement Entitle... Delete Attach2Dynamics Refresh Process Convert To Share Email a Link Follow Flow 55 Twin Lane Email Sporting_goods@intuit.com

- Once the task is completed, click on Check-out button. Both Check-in & Check-out button are interchangeable.

User Adoption Monitor - User Manual

The screenshot shows the Dynamics 365 interface for a 'Repair AC' case. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, and Opportunities. The main area displays the case details, including the title 'Repair AC', ID 'CAS-01002-P5X2Y6', and subject '---'. The 'Timeline' section shows recent activities. On the right, a context menu is open, and the 'Check Out' option is highlighted with a red box.

- Now go to Entity Configurations→Case-checkincheckout. Here, you can view associate Tracking records per user. Click on respective user for more details.

The screenshot shows the 'USER ADOPTION ENTITY CONFIGURATION' page for 'Case-checkincheckout'. The 'General' tab is active, displaying configuration details such as Name, Entity Label, Entity Schema, Message, Period, and Action Name. Below the configuration details, there is a 'Trackings' section with a table of records. The first record in the table is highlighted with a red box.

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:...

- Then click on record URL and you will be directed to the record that the user worked on.

Tracking Details					
			Refresh	Run Report	...
✓	Name	Record URL	Access Date Time (for Lo...	Status Re...	Created On
	Track Details: Sam Inogic - Case -	https://ipcrmug.crm.dynamics.com/main.aspx?etn ---		Checkin	10/22/2019 9:01...
	Track Details: Sam Inogic - Case -	https://ipcrmug.crm.dynamics.com/main.aspx?etn ---		Checkout	10/22/2019 9:06...
	Track Details: Sam Inogic - Case -	https://ipcrmug.crm.dynamics.com/main.aspx?etn ---		Checkin	10/22/2019 9:07...
	Track Details: Sam Inogic - Case -	https://ipcrmug.crm.dynamics.com/main.aspx?etn ---		Checkout	10/22/2019 9:07...

Verify Tracking

Let us go ahead and verify our entity configurations.

[Add a new account](#)

Save

Save & Close

New

Flow

Account: Account

New Account

Summary

Attach2Dynamics

Project Price Lists

ACCOUNT INFORMATION

Account Name

Novino Informatics

Phone

458-856

Fax

654-964

Website


https://www.novinoinfo.com

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 creates by that user for that day.

Show Chart	Delete	Refresh	Log Out	Email a Link	Flow	Run Report	Excel Templates	...
Active Tracking View								Search for records
✓ Name	↑	Count	User	Entity Label	Message	Start Date	End Date	Created On
Sam Inogic - Account - create	3		Sam Inogic.. Account	create		10/1/2019	10/31/2019	10/14/2019 9:2...

Update an account



Novino Informatics

Account · Account

Summary

Attach2Dynamics

Project Price Lists

ACCOUNT INFORMATION

Account Name

Novino Informatics

Phone

458-856


Fax

654-964

Website

https://www.novinoinfo.com

Parent Account



AtomLife Solutions Pvt Ltd.

Ticker Symbol

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.

Show Chart

Delete

Refresh

Log Out

Email a Link

Flow

Run Report

Excel Templates

...

Active Tracking View

Search for records

✓

Name

↑

▼

Count

▼

User

▼

Entity Label

▼

Message

▼

Start Date

▼

End Date

▼

Created On

▼

Sam Inogic - Account - update

1

●

Sam Inogic.. Account

update

10/28/2019

10/28/2019

10/28/2019 2:4...

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)**

Account-ikl_open

User Adoption Entity Configuration

General

Related

<div><div></div><div>Name</div></div>	Account-ikl_open	<div>Owner</div>	<div><div>*</div><div><div></div><div></div></div><div>Sam Inogic</div></div>
<div><div></div><div>Entity Label</div></div>	<div><div>*</div><div>Account</div></div>	<div><div></div><div>Message</div></div>	<div><div>*</div><div>ikl_open</div></div>
<div><div></div><div>Entity Schema</div></div>	<div><div>*</div><div>account</div></div>	<div><div></div><div>Period</div></div>	<div><div>*</div><div>Daily</div></div>

Trackings

Refresh

Run Report

<div><div>✓</div><div>Name</div></div>	<div>↑</div>	<div>Count</div>	<div>User</div>	<div>Entity La...</div>	<div>Message</div>	<div>Start Date</div>	<div>End Date</div>	<div>Created On</div>
Sam Inogic - Account - ikl_open	2	<div><div></div><div></div></div> Sam Inogic	Account	ikl_open	11/1/2019	11/1/2019	11/1/2019 6:5...	

- 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/UserAdoption.ExecuteReadAction.js**

Form Properties
Modify this form's properties.

Events | Display | Parameters | Non-Event Dependencies

Form Libraries

Manage libraries that will be available in the form.

+ Add | Remove | Up | Down | Edit

Name	Display Name	Description
ikl_/UserAdoption/scripts/jquery.js	ikl_/UserAdoption/scripts/jquery.js	
ikl_/UserAdoption/UserAdoption.XRMLi...	ikl_/UserAdoption/UserAdoption.XRMLi...	
ikl_/UserAdoption/UserAdoption.Execut...	ikl_/UserAdoption/UserAdoption.Execut...	Script to call the r...

Event Handlers

Manage functions that are called for form or field events.

Control: Form

Event: OnLoad

+ Add | Remove | Up | Down | Edit | Edit Library

Library	Function	Enabled
ikl_/UserAdoption/UserAdoption.Execut...	getRecordDetails	True

OK Cancel

- 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.

Handler Properties ×

Details

Dependencies

Library

ikl_/UserAdoption/UserAdoption.ExecuteReadA

Function *

getRecordDetails

☒

Enabled

Parameters

☐

Pass execution context as first parameter

Comma separated list of parameters that will be passed to the function

OK

Cancel

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;

Sam Inogic - Account - update

User Adoption Tracking

General Related

Tracking Summary

Name	* Sam Inogic - Account - update	Owner	* Sam Inogic
Entity Label	Account	Message	update
Entity Configuration Id	Account-update	Count	3
Start Date	10/4/2019	User	Sam Inogic
End Date	10/4/2019		

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.

Sam Inogic - Account - update

User Adoption Tracking

General Related

End Date

10/4/2019

Tracking Details

Refresh
 Run Report

Name	↑	Record URL	Access Date Time (for Login o...	Status Reas...	Created On	↑
Track Details: Sam Inogic - Accou		https://ipcrmug.crm.dynamics.com/main.aspx?etn ---		Active	10/4/2019 10:56...	
Track Details: Sam Inogic - Accou		https://ipcrmug.crm.dynamics.com/main.aspx?etn ---		Active	10/4/2019 10:57...	
Track Details: Sam Inogic - Accou		https://ipcrmug.crm.dynamics.com/main.aspx?etn ---		Active	10/4/2019 10:57...	




A tracking detail record provides you with the following information;

Track Details: Sam Inogic - Account - update - 10/4/2019 10:56:32 AM

User Adoption Tracking Details

General

Related

Name	* Track Details: Sam Inogic - Account - update - 10/4...
Owner	*  Sam Inogic
Record Guid	f4b4be9a-32e4-e911-b3b9-0003ffaa2115
Record URL	https://ipcrmug.crm.dynamics.com/main.aspx?... 
Tracking Id	 Sam Inogic - Account - update

- **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 *Advanced Settings > Settings > Security > Users*.

Dynamics 365


Settings

Security


MANAGE ENTITY ACTION

Security


Which feature would you like to work with?




Users
 Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.



Security Roles
 Create new security roles. Manage and delete existing security roles for your organization.

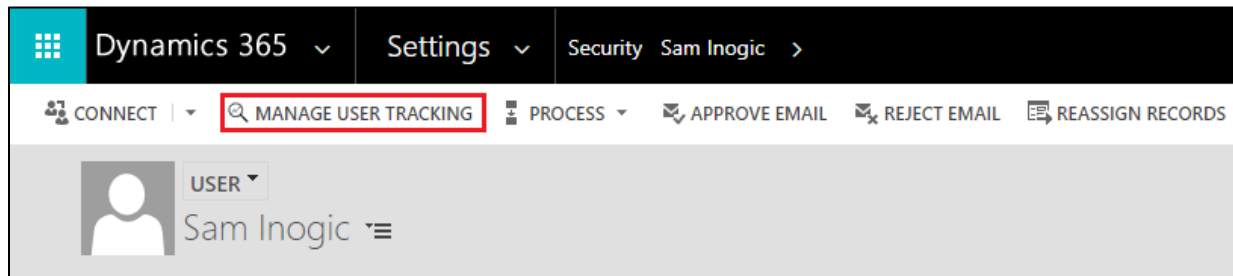


Field Security Profiles
 Manage user and team permissions to read, create, or write information in secured fields.

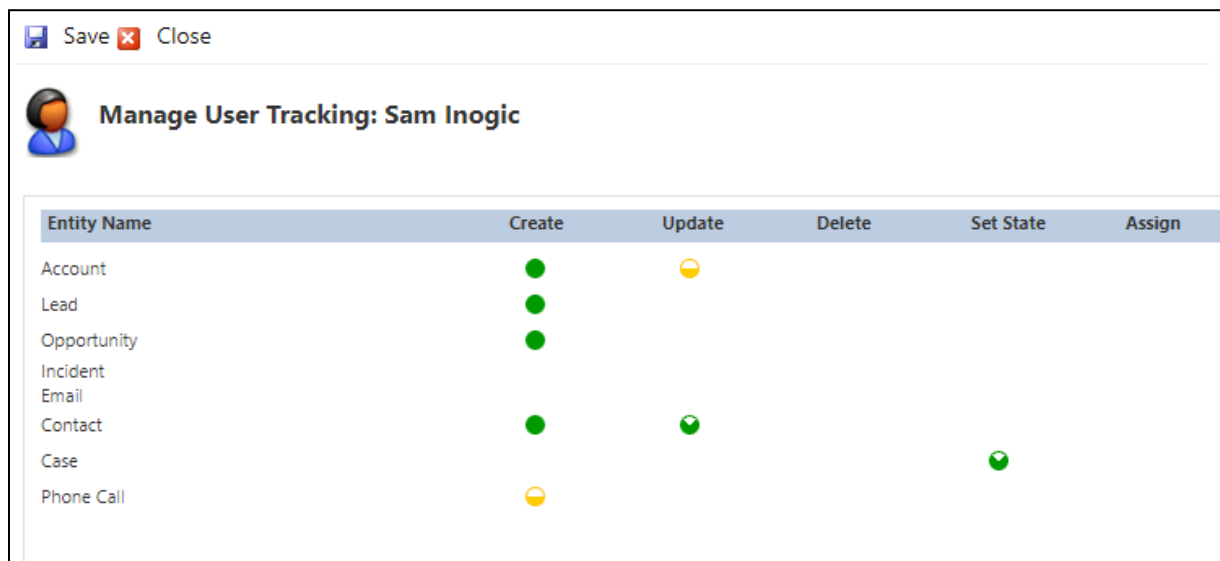


Positions
 Add new Position. Modify the Position description.

- 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.

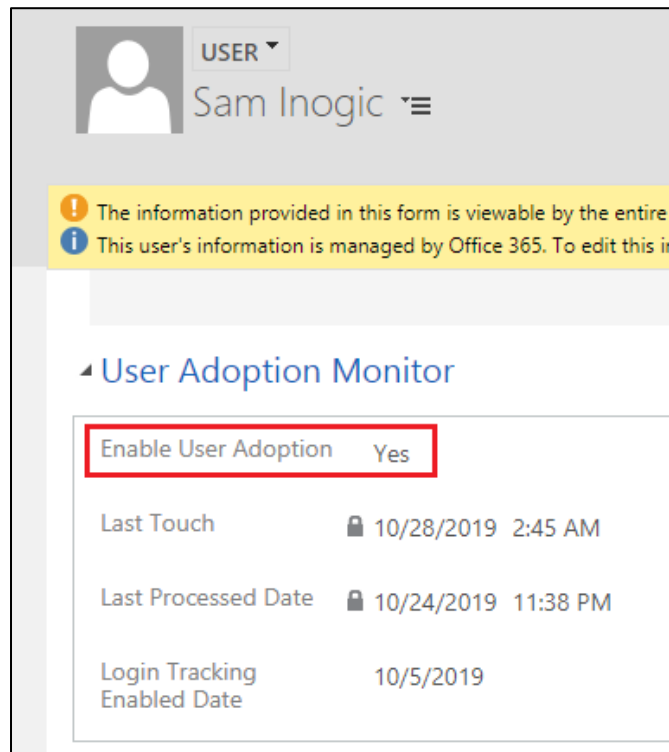
Note: For opportunity, we have enabled Win message/action, and since it is not available as a message/action in the UI, Opportunity will be listed here, but no options against it will be available.

- 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.



The screenshot shows the 'User Adoption Monitor' section for a user named 'Sam Inogic'. At the top, there is a user profile icon and the name 'Sam Inogic' with a dropdown arrow. Below this, there are two informational messages: one with a yellow background stating 'The information provided in this form is viewable by the entire organization' and another with a blue background stating 'This user's information is managed by Office 365. To edit this information, you must be an administrator.' The 'User Adoption Monitor' section is highlighted with a blue header. Below the header, there is a table with the following data:

User Adoption Monitor	
Enable User Adoption	Yes
Last Touch	10/28/2019 2:45 AM
Last Processed Date	10/24/2019 11:38 PM
Login Tracking Enabled Date	10/5/2019

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.

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