



User Adoption Monitor



User Adoption Monitor

User Adoption Monitor - White Paper

Aim:

Enables managers to monitor the user actions performed across CRM 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 the user on particular Entity records
- Track and monitor CRM access of users
- Track and monitor aggregate value of user actions related to a particular entity
- Track and monitor target value allotted to users
- Track and ensure the completeness of an entity record

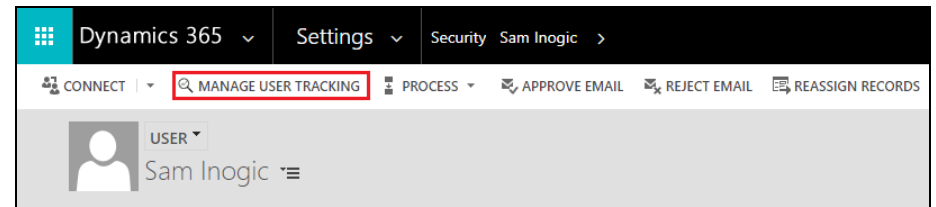
Supported Versions

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

Deployment Models: On-Premise and Online.

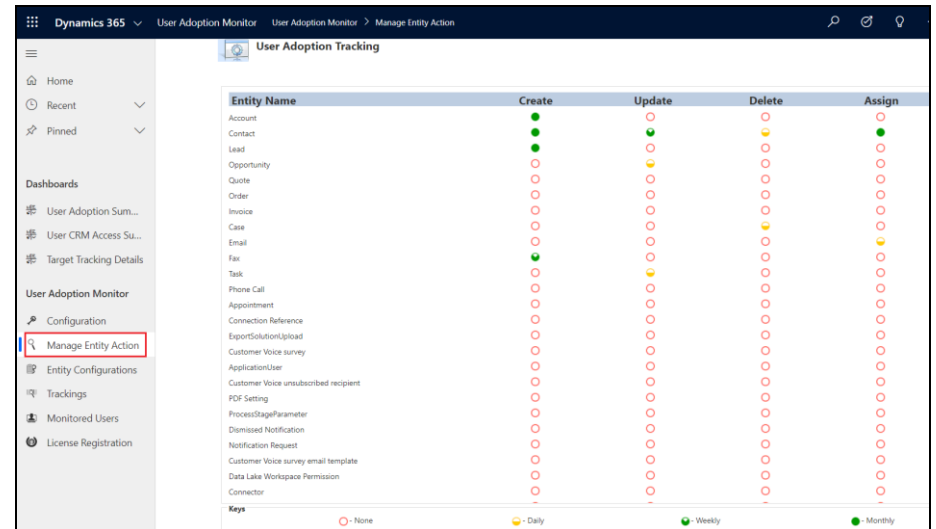
Ease of Access:

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



User Adoption User Interface:

User Adoption tracking settings can be configured from Manage Entity Action. Here the Managers can configure the entities and actions that need to be tracked/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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Application-loginlogout

User Adoption Entity Configuration

General Related

Name	Application-loginlogout	Owner	Nadin Hathway			
Entity Label	Application	Message	loginlogout			
Entity Schema	application	Period	Daily			

Trackings							Refresh	Run Report	
✓ Name	Total	Target	User	Start Date	End Date	Created On			
Nadin Hathway - Application - loginlogout	4.00	---	Nadin Hathway	8/6/2020	8/6/2020	8/6/2020 3:03 PM			

Check-in & Check-out

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

Case-checkincheckout

User Adoption Entity Configuration

General Related

Name	Case-checkincheckout	Owner	Nadin Hathway			
Entity Label	Case	Message	checkincheckout			
Entity Schema	incident	Period	Daily			
		Action Name	Case - CheckinCheckOut			

Case-checkincheckout

User Adoption Entity Configuration

General Related

Trackings							Refresh	Run Report	
✓ Name	Total	Target	User	Start Date	End Date	Created On			
Nadin Hathway - Case - checkincheckout	6.00	---	Nadin Hathway	8/6/2020	8/6/2020	8/6/2020 5:33 PM			

Aggregate Tracking

Keep a track of aggregate value of actions performed by users in Dynamics 365 CRM.

Dynamics 365 User Adoption Monitor User Adoption Monitor > Entity Configurations > Opportunity-win									
Save Save & Close + New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report									
Home Recent Pinned									
Dashboards									
User Adoption Sum... User CRM Access Su... Target Tracking Details									
User Adoption Monitor									
Configuration Manage Entity Action Entity Configurations									
Trackings Monitored Users License Registration									
Opportunity-win User Adoption Entity Configuration									
General Related									
Robredo Silva - Opportunity - win 2.00 --- Robredo Silva 7/24/2020 7/24/2020 7/24/2020 6:00 ...									
Aggregate Trackings									
Refresh Run Report									
✓ Name	Total	Target	User	Start Date	End Date	Created On			
Robredo Silva - Opportunity - win - Actual Revenue	20,000.00	---	Robredo Silva	7/24/2020	7/24/2020	7/24/2020 6:00 ...			

Target Tracking

Keep a track of targets allotted to users for a given period of time.

Opportunity-win

User Adoption Entity Configuration

General

Related

✓ Attribute

Aggregate Type

Created On

Actual Revenue

SUM

7/24/2020 5:5...

✓ Name

Target

Interval

Start Date

Opportunity-win - Count

10.00

Recurring

Opportunity - win - Actual Revenue - SUM

50,000.00

Recurring

Trackings

Refresh

Run Report

✓ Name

Total

Target

User

Start Date

End Date

Created On

Robredo Silva - Opportunity - win

2.00

10.00

Robredo Silva

7/24/2020

7/24/2020

7/24/2020 6:00 ...

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Data Completeness

Monitor and ensure the completeness of an entity record in CRM.

Patrick Jane
Contact · Contact ▾

Thomas Perry
Owner

Complete
Completeness

Summary Details Scheduling Files Related

CONTACT INFORMATION

First Name * Patrick

Last Name * Jane

Job Title ---

Account Name ---

Email patrick@gmail.com

Business Phone 544545445

Mobile Phone ---

Company ---

Opportunities

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: Chris Taylor

Entity Name	Create	Update	Delete	Assign
Account	○	●		
Contact		●		
Lead				●
Opportunity				

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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