User Adoption Monitor

innovative logic

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

***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.

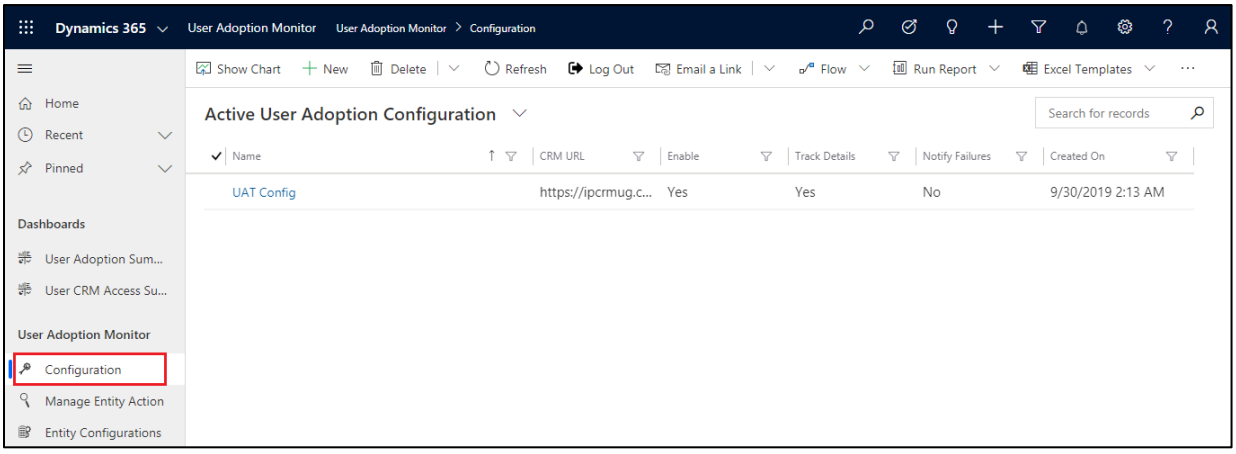
Getting Started

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

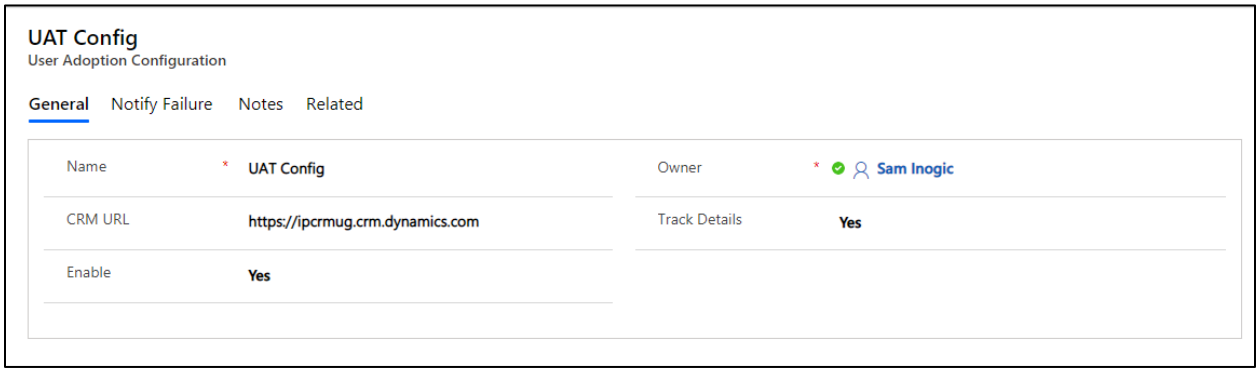
Once the User Adoption Monitor solution is installed and activated, there is already a User Adoption Configuration record created for you. In case if the record is not created or you wish to update the existing record please follow the below-mentioned steps.

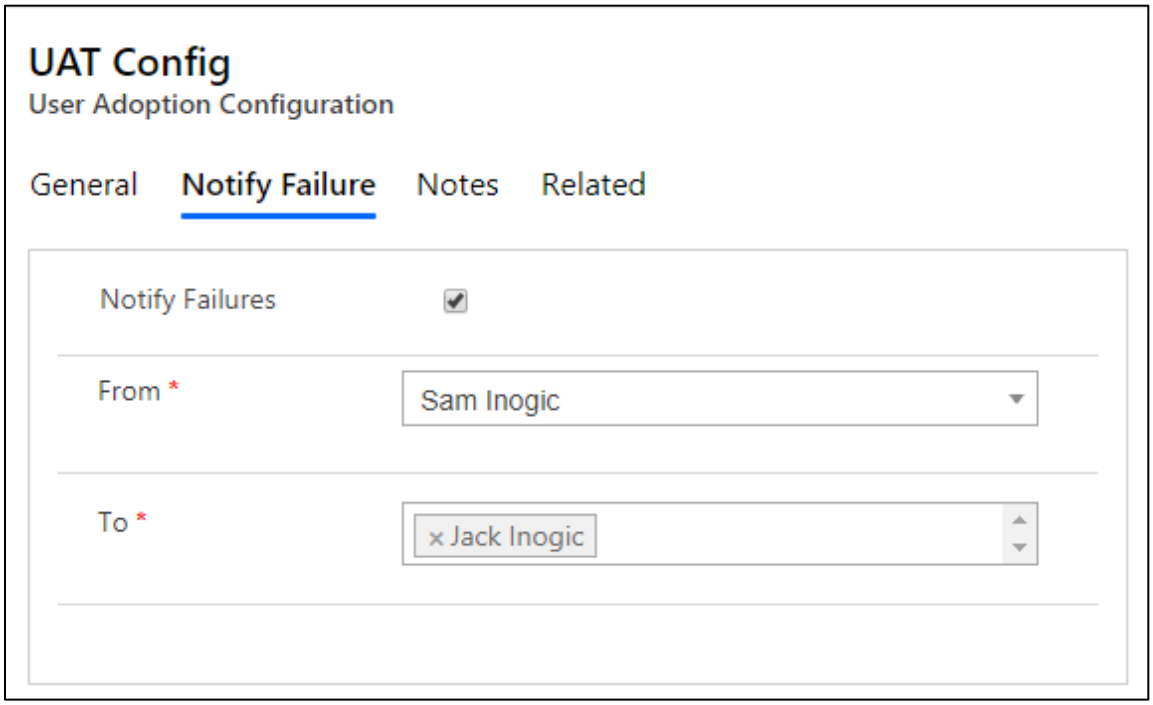
- Navigate to *User Adoption Monitor App> Configuration*



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

Fill Values in this Entity





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.

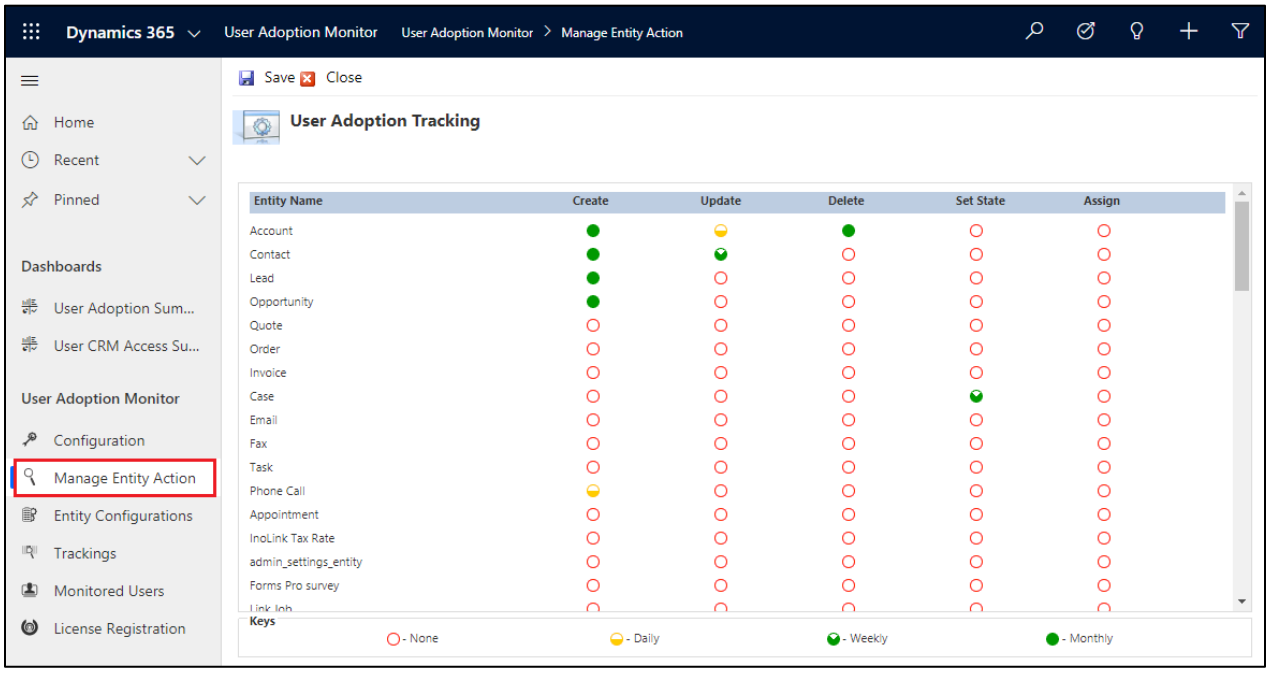
Importance of Tracking Details

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.*



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;

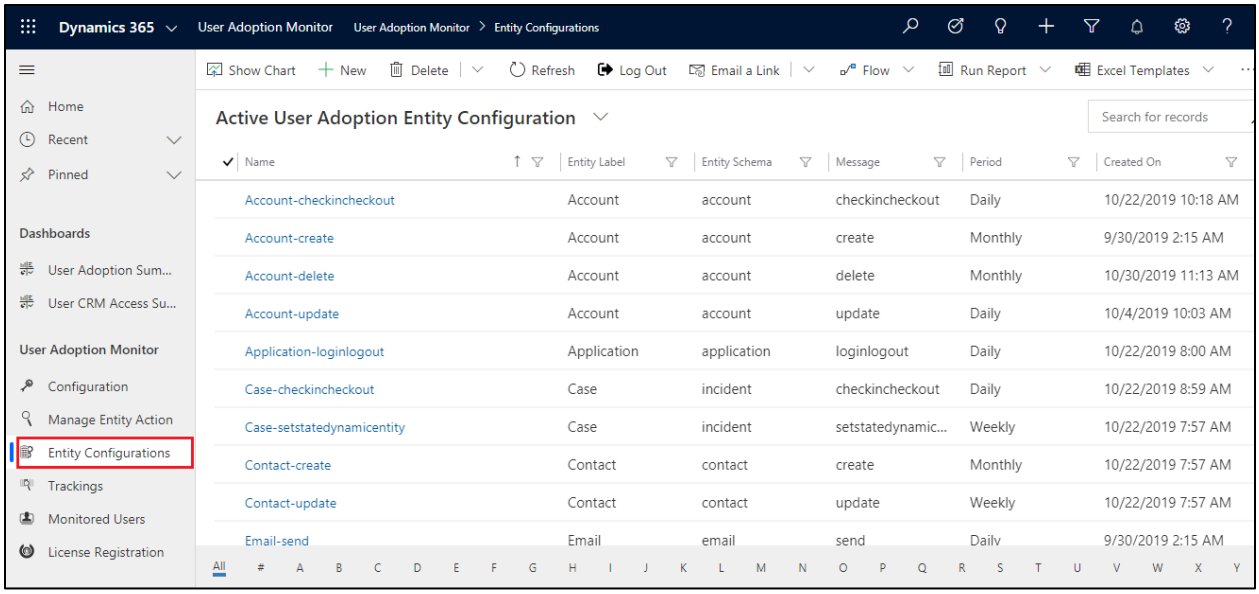
- None	Represents tracking is not enabled at all.
- Daily	Represents changes will be tracked and summarized daily.
- Weekly	Represents changes will be tracked and summarized by the week.
- Monthly	Represents changes will be tracked and summarized by the month.

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.

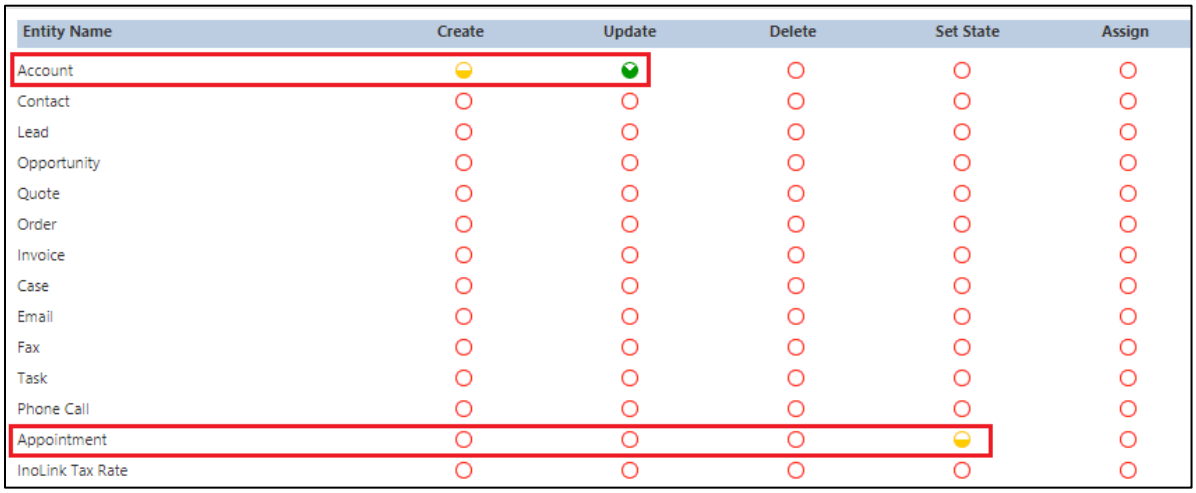
Entity Name	Message	Description
Lead	Qualifylead	This message is triggered when a lead is qualified.
Opportunity	Win	It is triggered when an opportunity is closed as Won.
Quote	Close	Triggered when the quote is closed.
Quote	Win	It is triggered when the *Create Order* button is clicked on the quote to 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
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.)



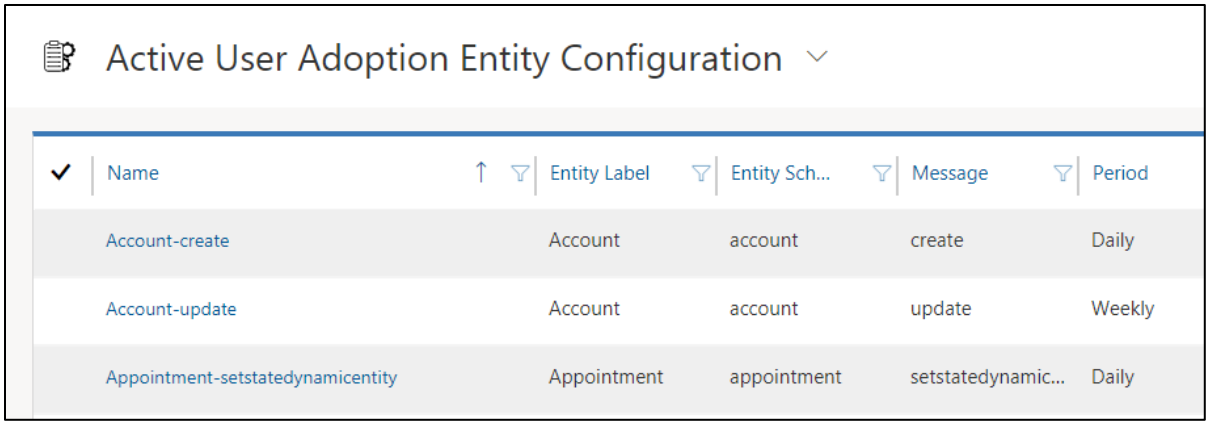
Example for Entity Tracking

- 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.



- 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.

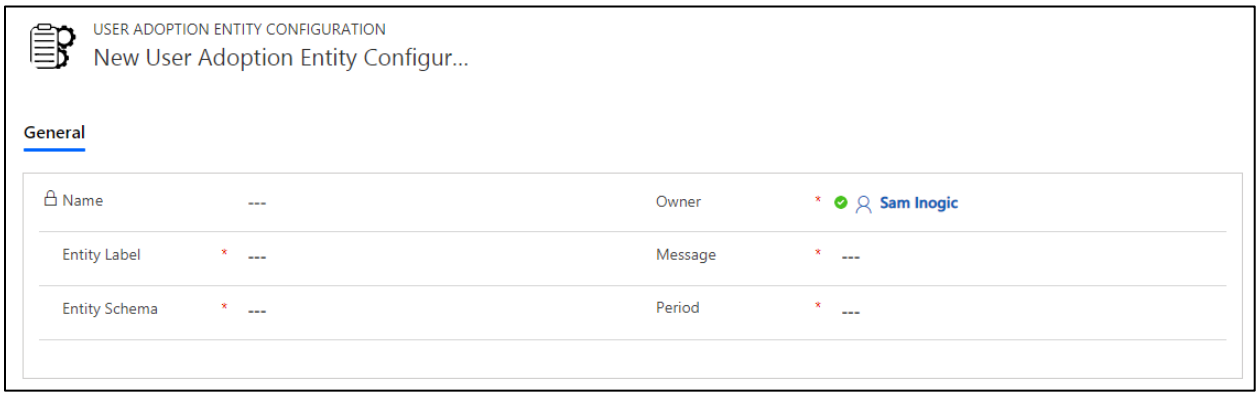
Note: *Through the User Adoption Tracking screen you can only configure to monitor CRUD operations performed on entities. To monitor other actions performed by the user on the entities you need to create the User Adoption Entity Configuration Record manually.*

Log-in & Log-out Entity Configuration

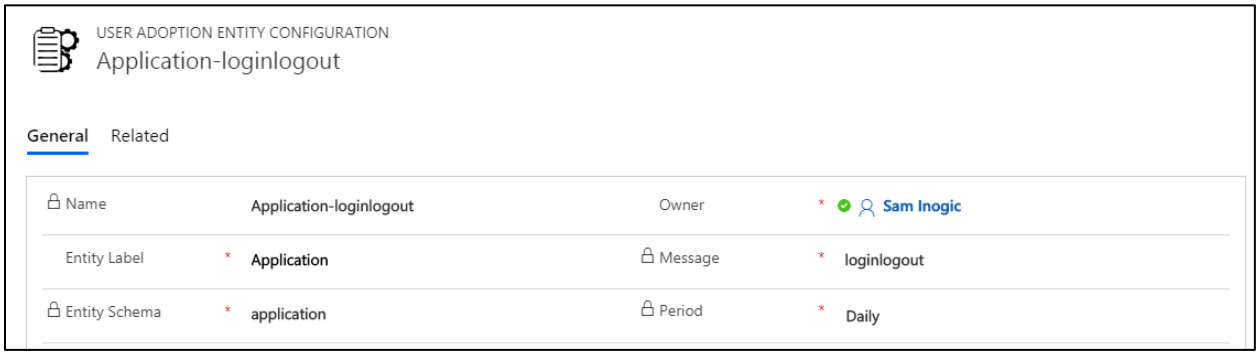
Note: User Adoption Monitor Administrator or User Adoption Monitor User role is necessary to access Log-in/Log-out button.

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:

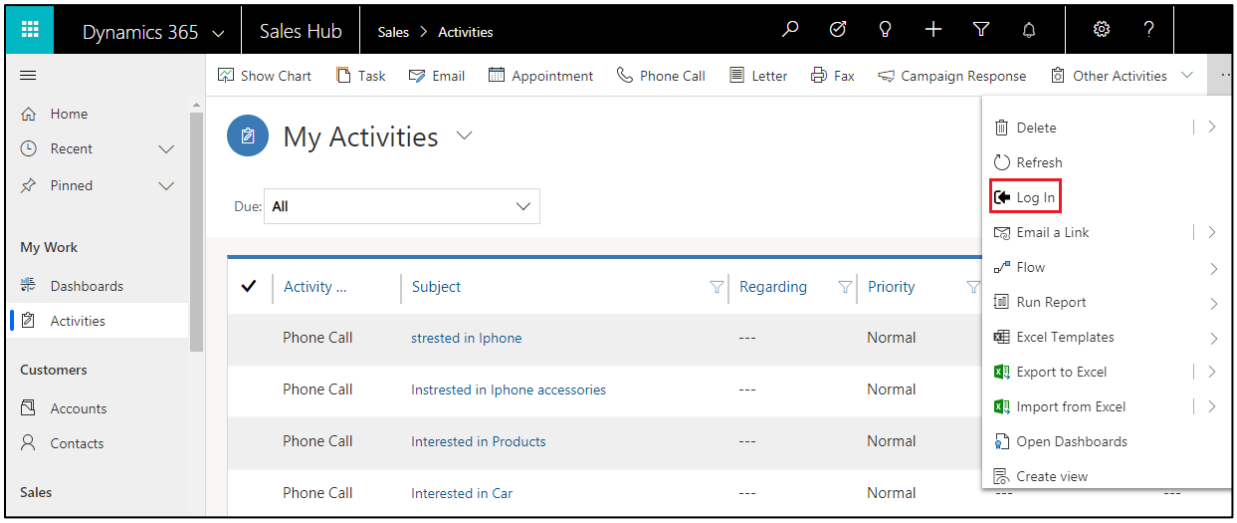
- Navigate to Entity Configurations (User Adoption Monitor group), click on New.



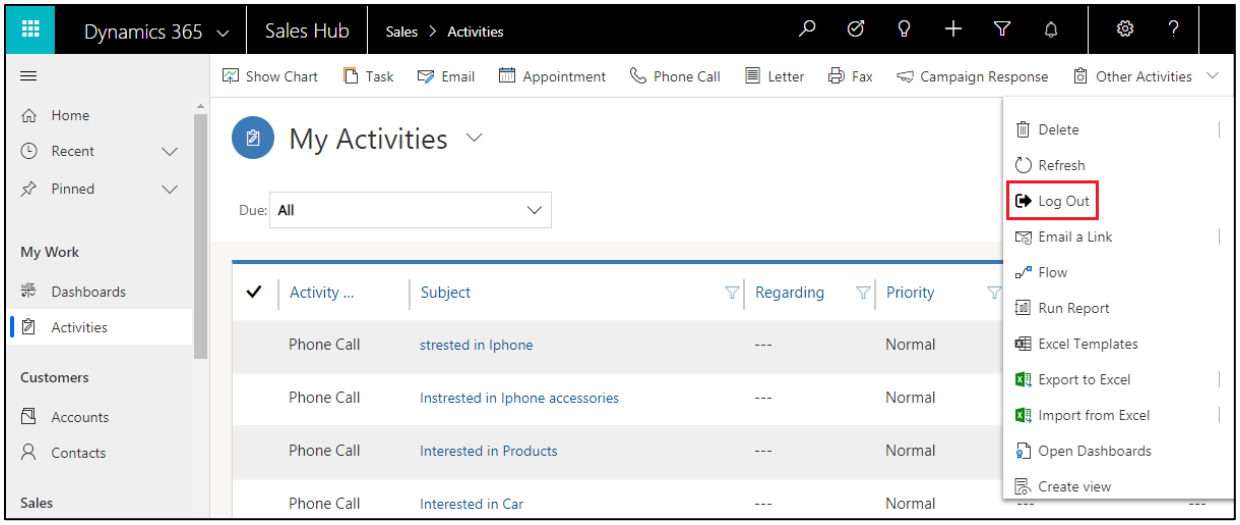
- Here, fill the fields as follows:
    - **Entity Label:** *Application*
    - **Message:** *loginlogout* (Once the message field id filled, Entity Schema & Period field will be auto populated)
- Click on Save.



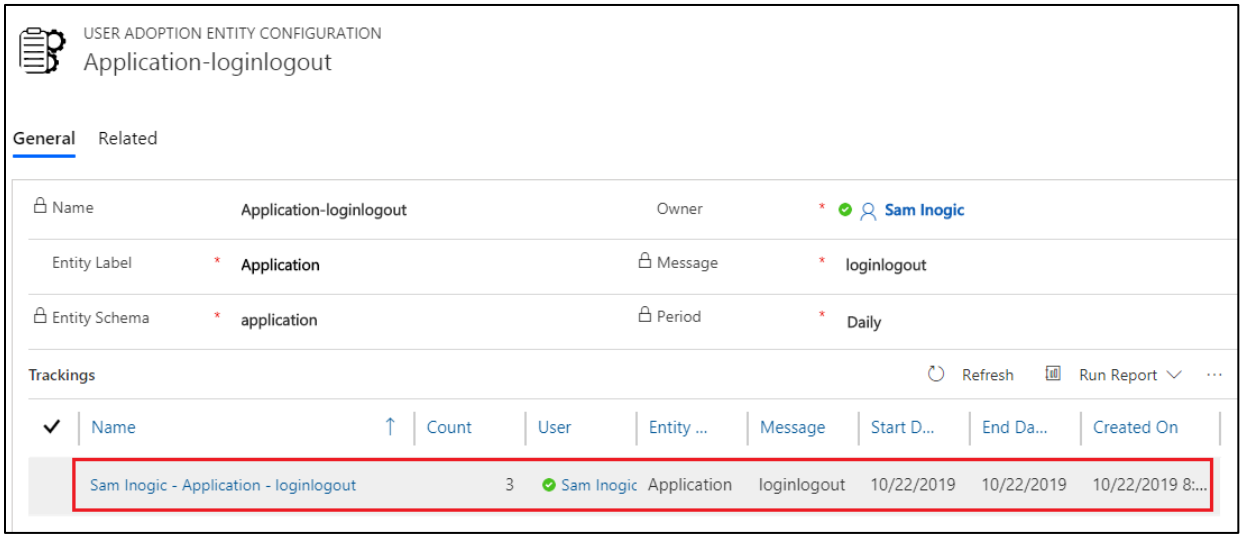
- After entity configuration, the Log-in button will be displayed on the home grid.



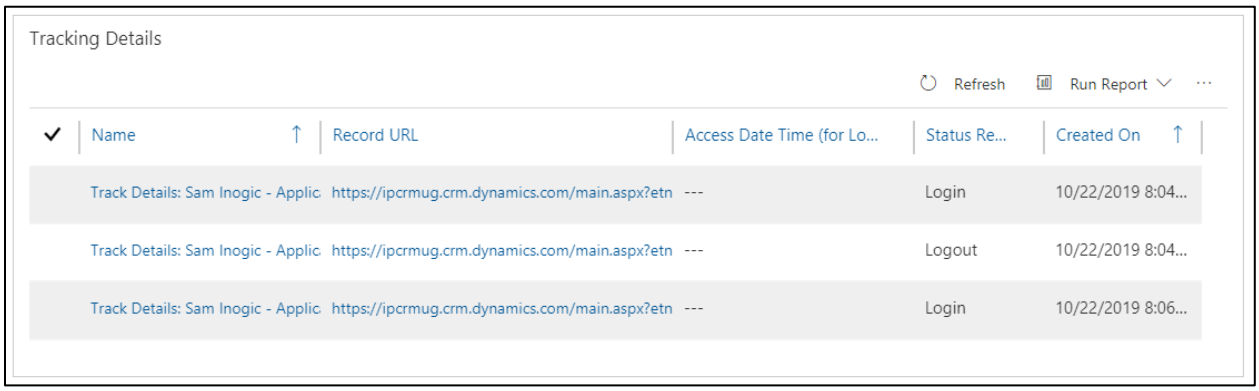
- Click on Log-in button as soon as you login to your CRM account. Once the activities are completed click on Log-out button. The Log-in/Log-out button interchanges as you click on it.



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



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

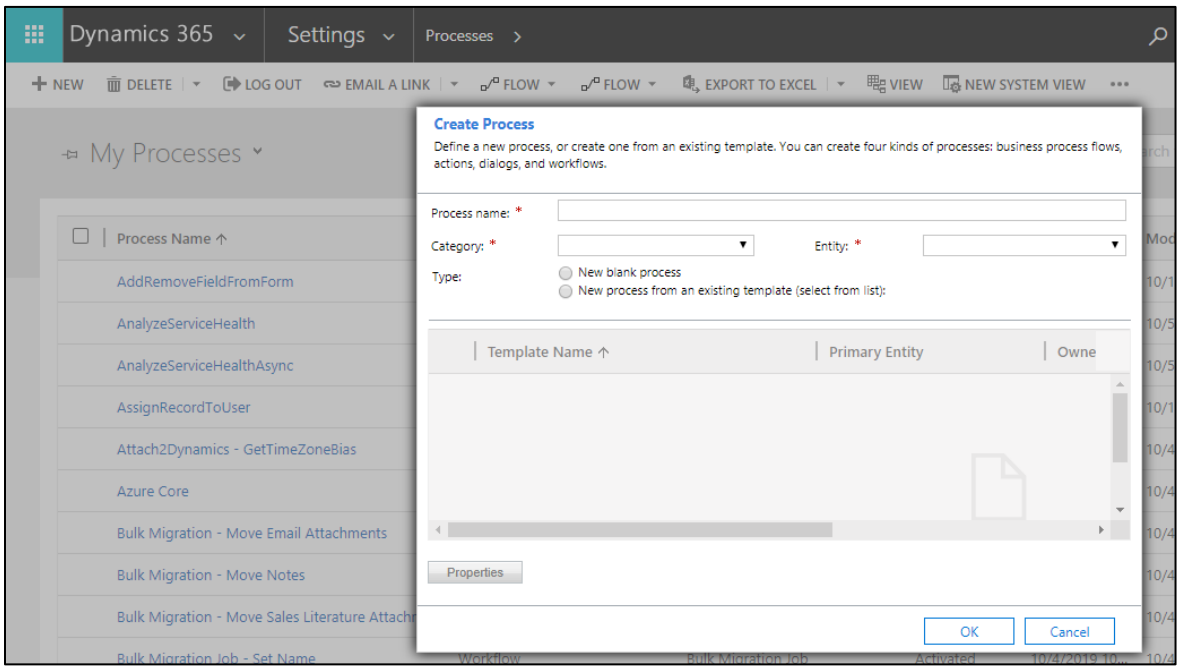


Check-in & Check-out Entity Configuration

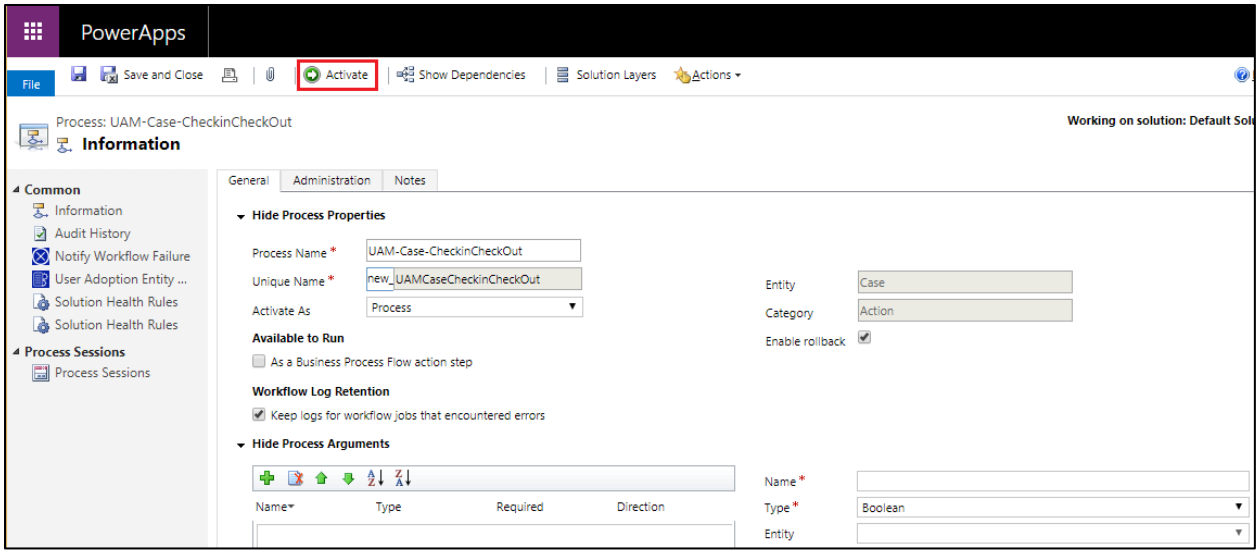
Note: User Adoption Monitor Administrator or User Adoption Monitor User role is necessary to access Check-in/Check-out button.

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:

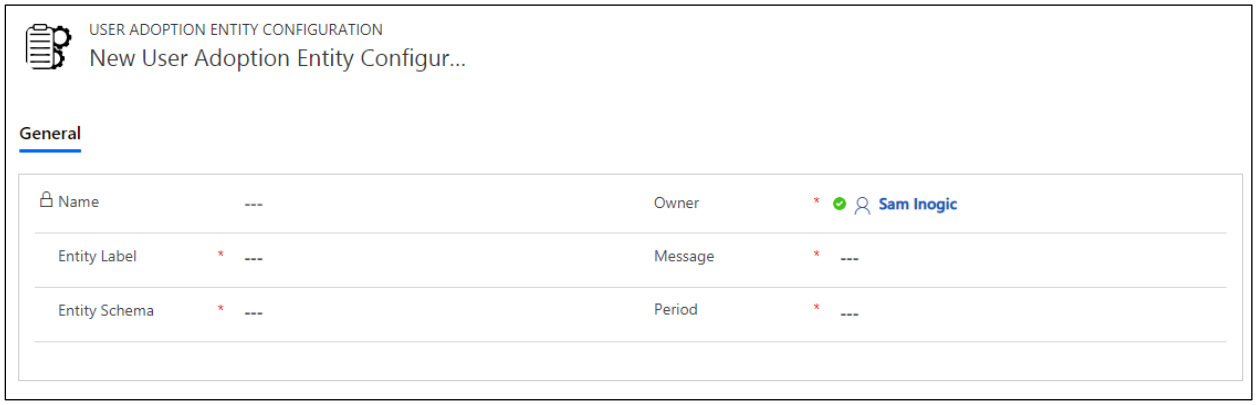
- First, you have to create action for the required entity. For each entity, you have to create separate actions. Go to Advanced Settings→ Settings→Processes. Click on New.



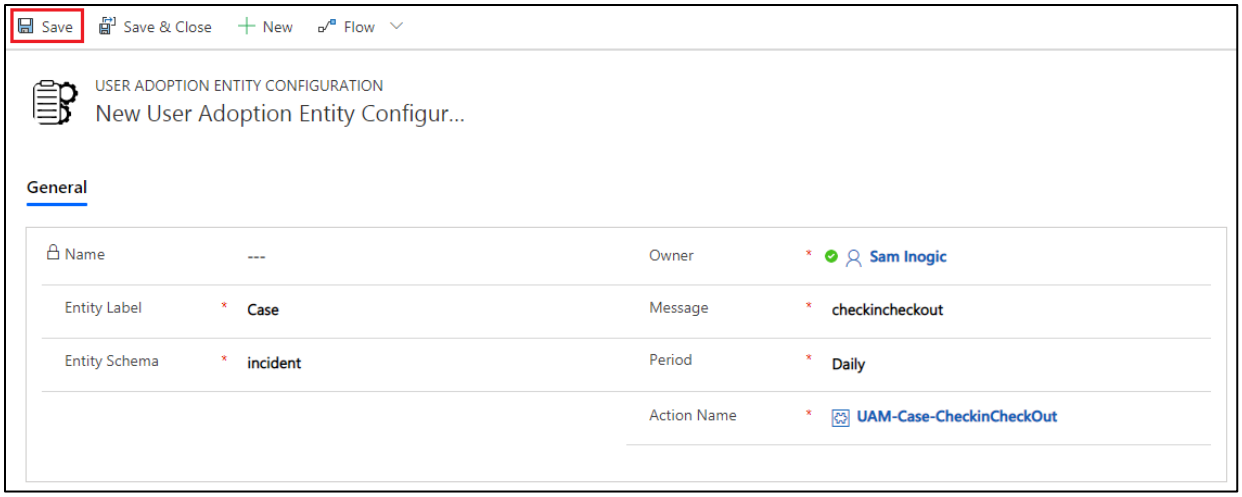
- Next, fill the required fields as follows:
  - **Process name:** Name the process, for e.g. UAM-Case-CheckInCheckOut
  - **Category:** Select 'Action'
  - **Entity:** Select the required entity. Here 'Case' entity is selected
- Once the details are filled, click on Ok. Then 'Activate' the action as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



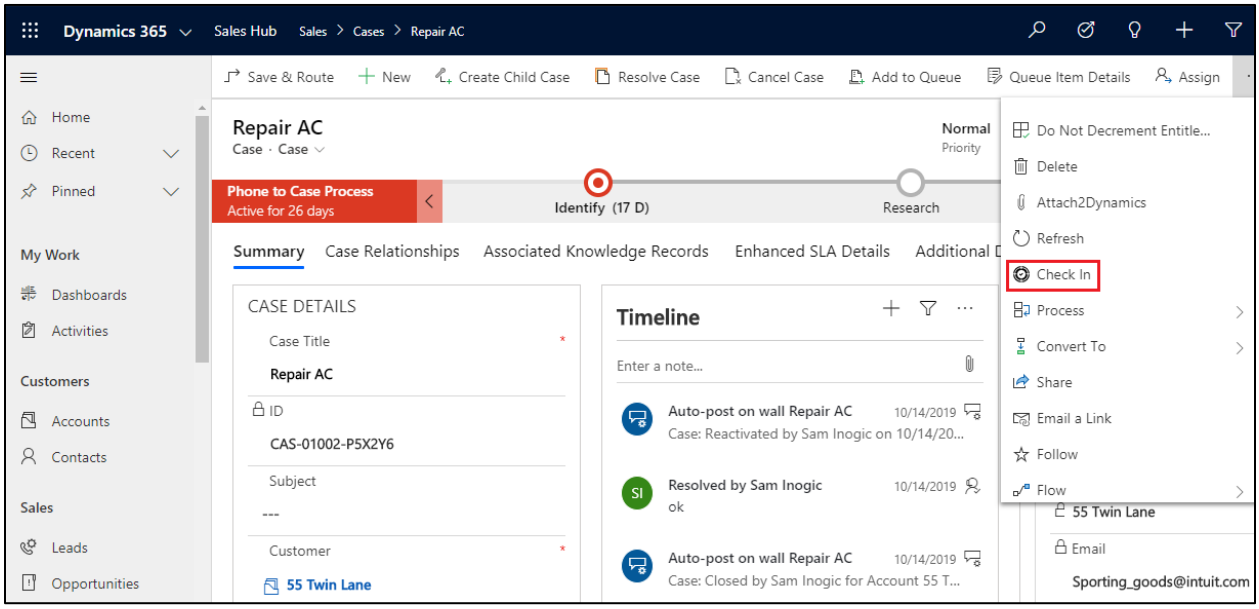
- Now, go to Entity Configurations (User Adoption Monitor group). Click on New.



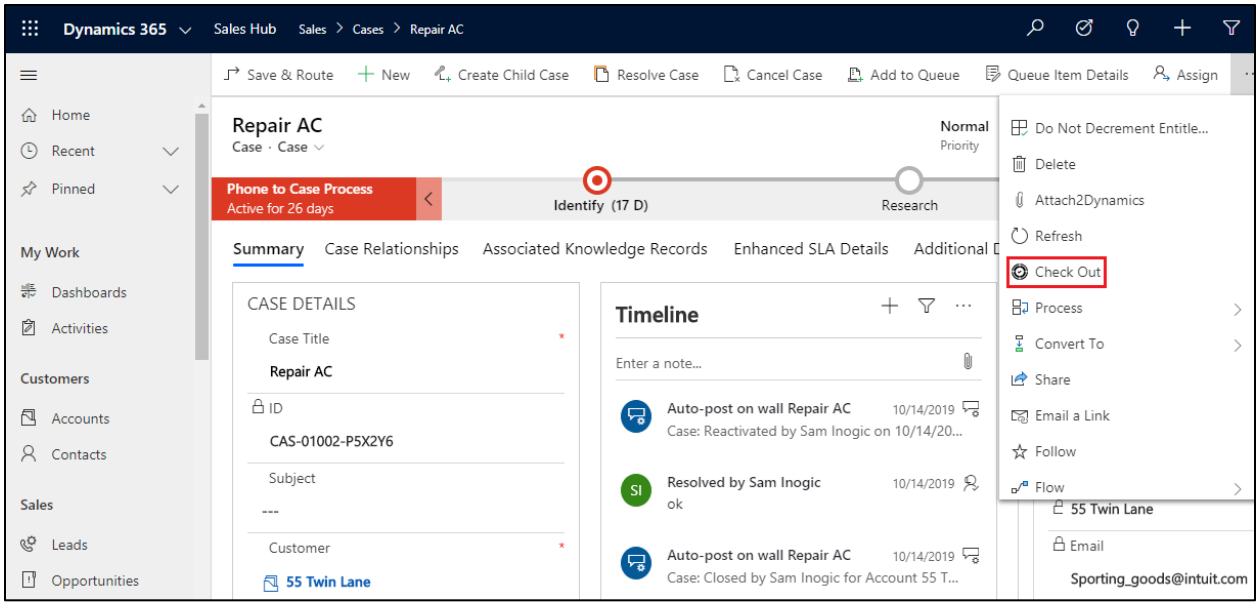
- Fill the required fields as follows:
  - **Entity Label:** Give name of required entity. For e.g. Case
  - **Message:** *checkincheckout.* (After populating this field, you will get another lookup field – Action Name)
  - **Entity Schema:** case
  - **Period:** Select period i.e. Daily, Weekly or Monthly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



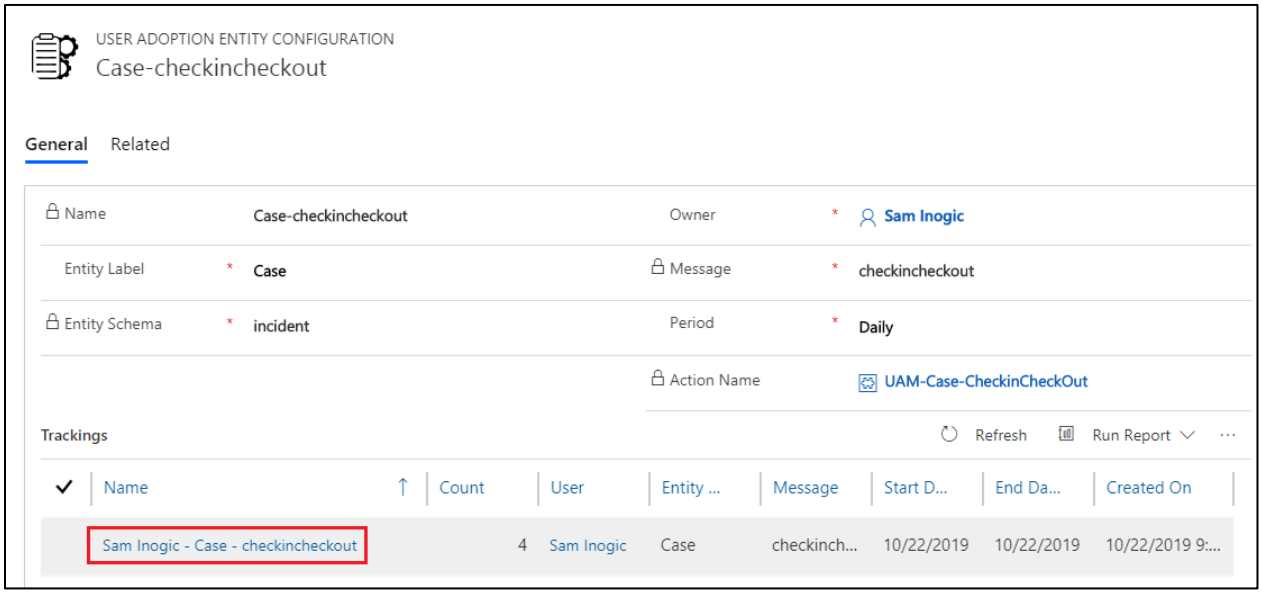
- Now go to a particular record in Case entity. Here, you will see the Check-in button. Click on the same before doing any task on that particular record.



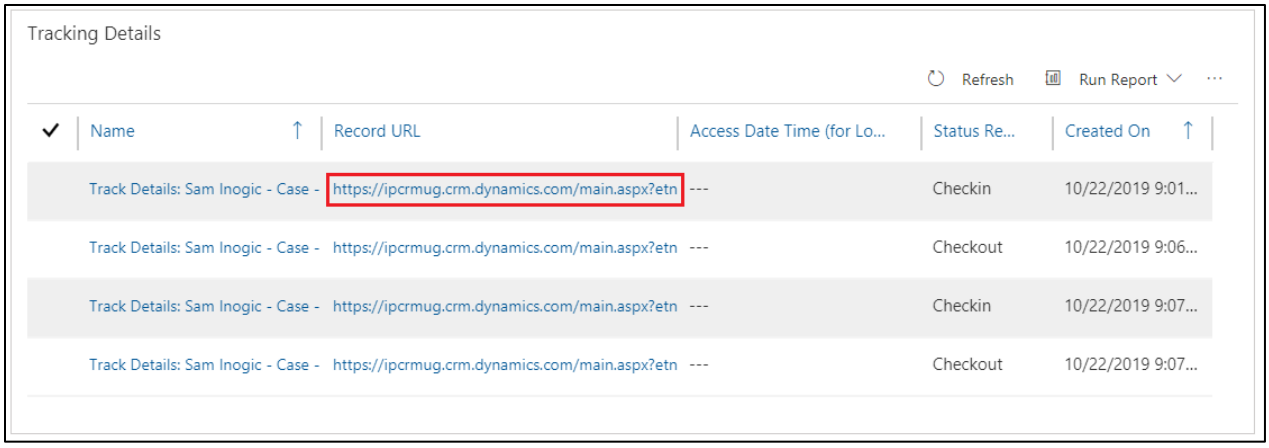
- Once the task is completed, click on Check-out button. Both Check-in & Check-out button are interchangeable.



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



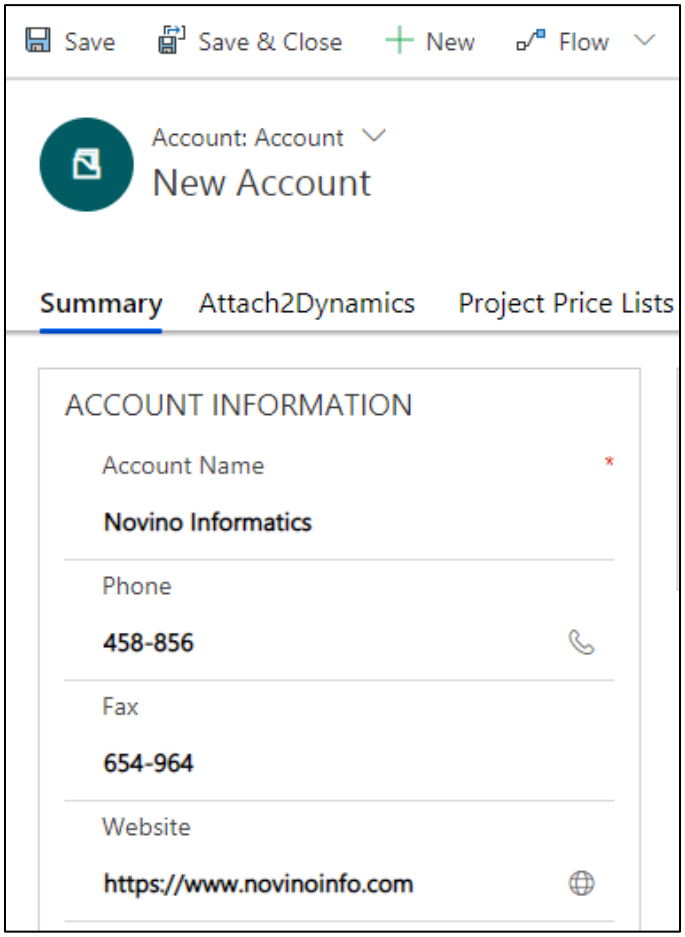
- Then click on record URL and you will be directed to the record that the user worked on.



Verify Tracking

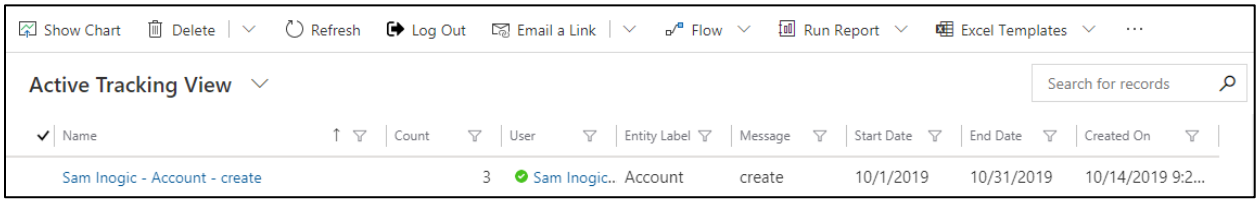
Let us go ahead and verify our entity configurations.

Add a new account

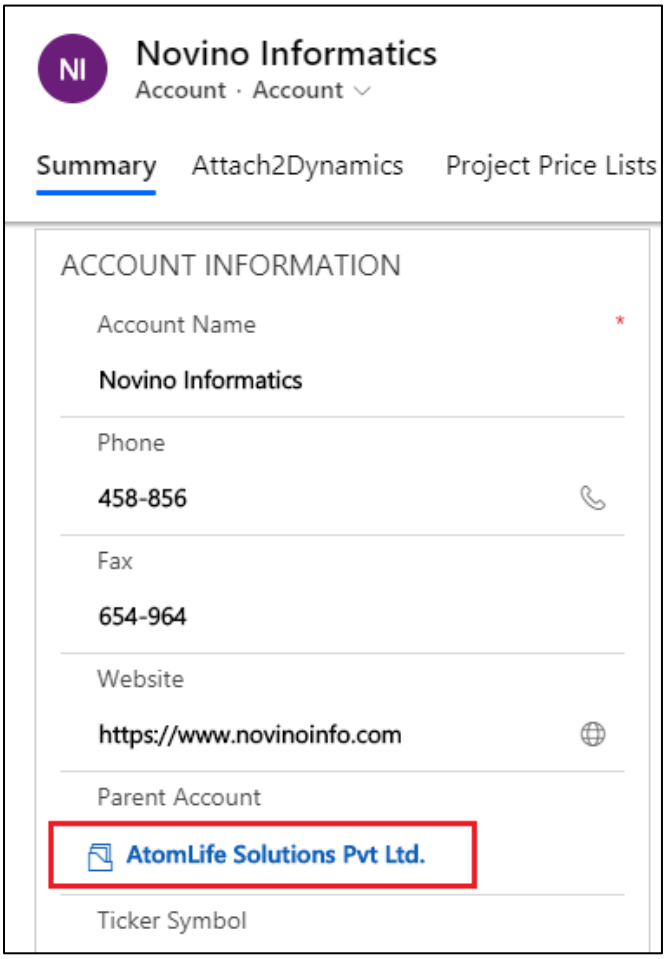


Upon save, navigate to the Tracking area of User Adoption to see the updates reflected there.

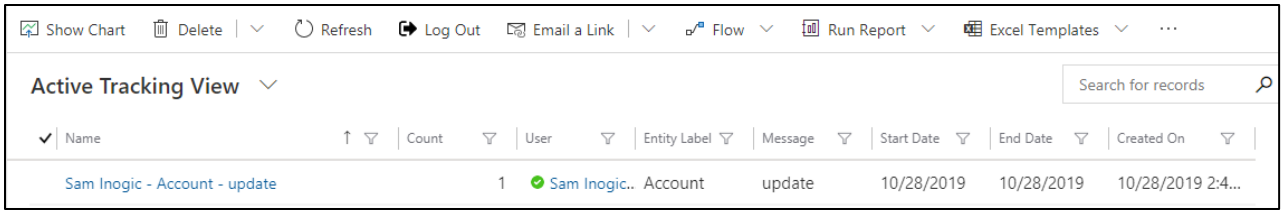
It would create a new tracking record per entity/message/period combination. Since we had selected to monitor Account creates daily, you will find one record each day per user for tracking creates by that user for that day.



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.

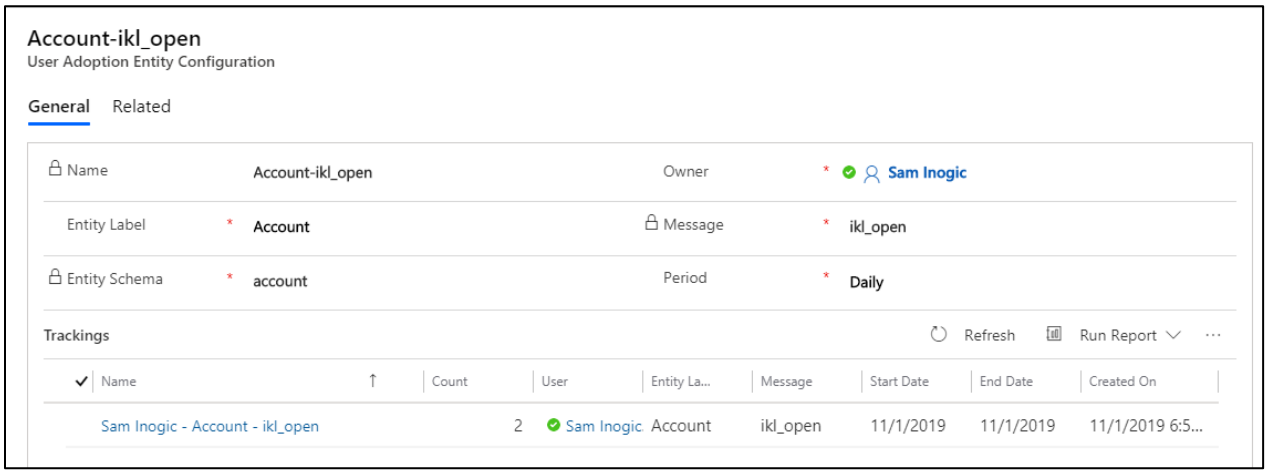


Track Opening of the Records

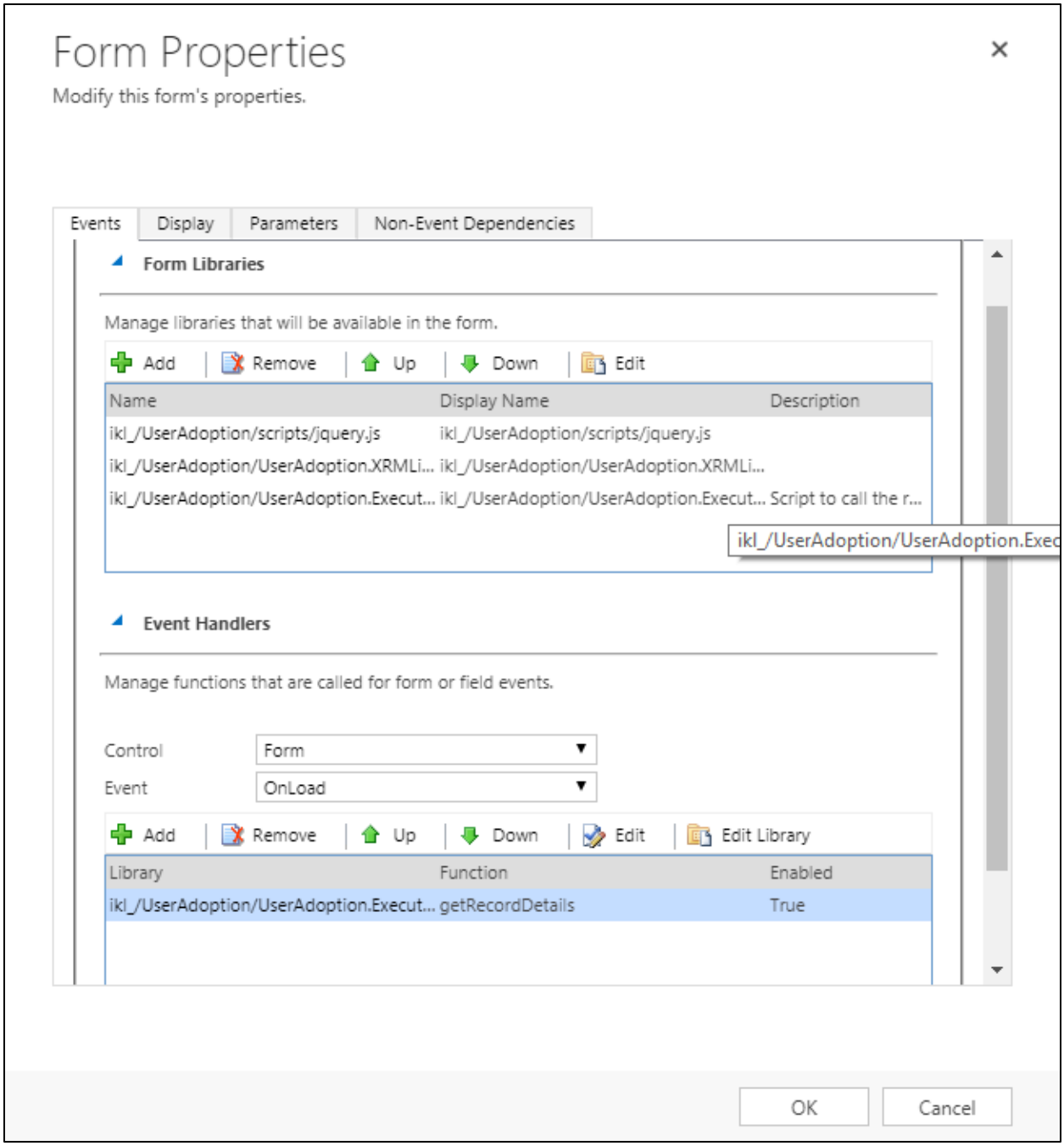
You can also track the touch of the records by tracking the opening of the records.

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.

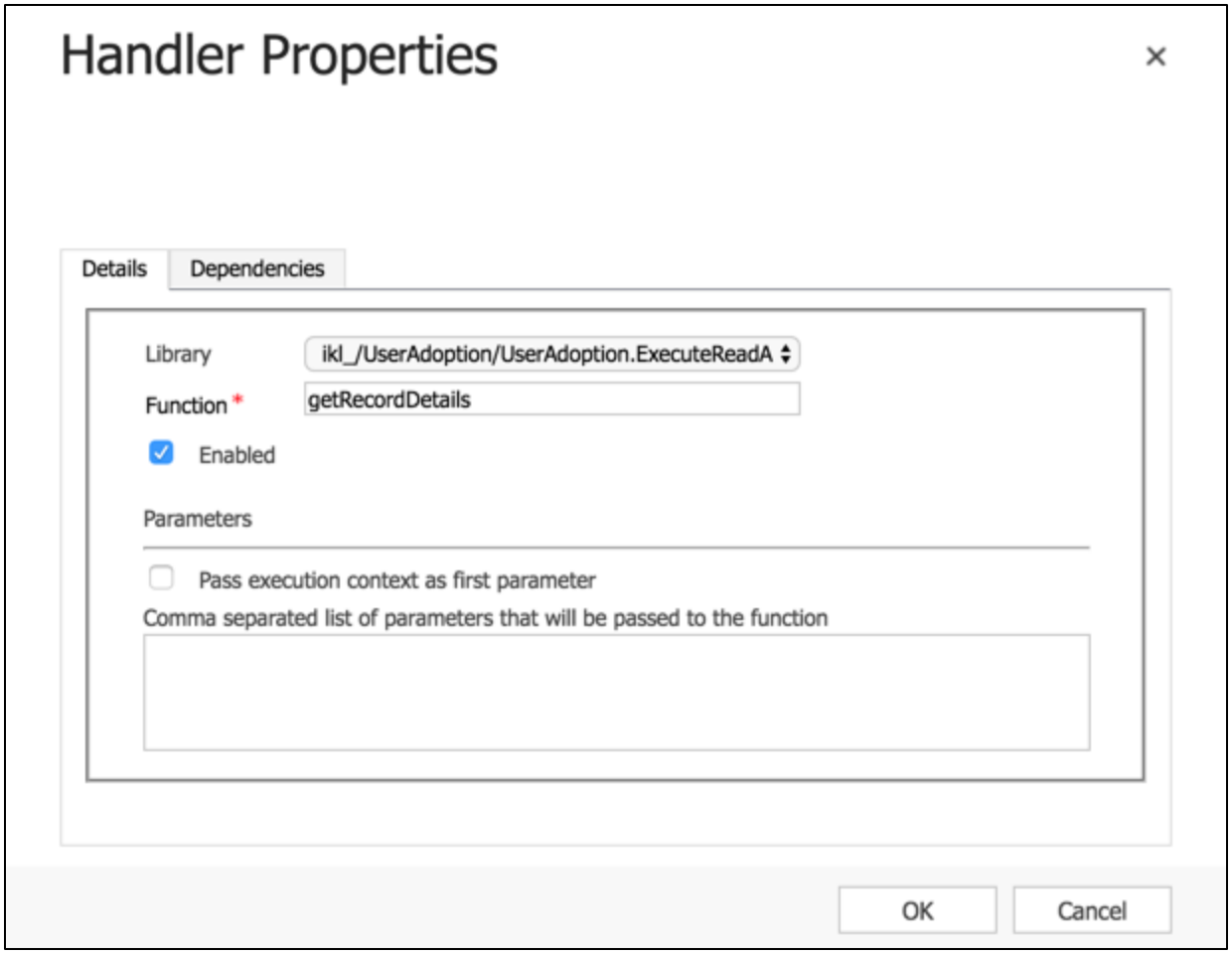
- Create a record of the User Adoption Entity Configuration Entity with the following details;
  - Entity Label : : **Account (entity on which you need track open/read)**
  - Entity Schema : : **account (schema name of the entity)**
  - Message : : **ikl_open**
  - Period : : **Daily (period you want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

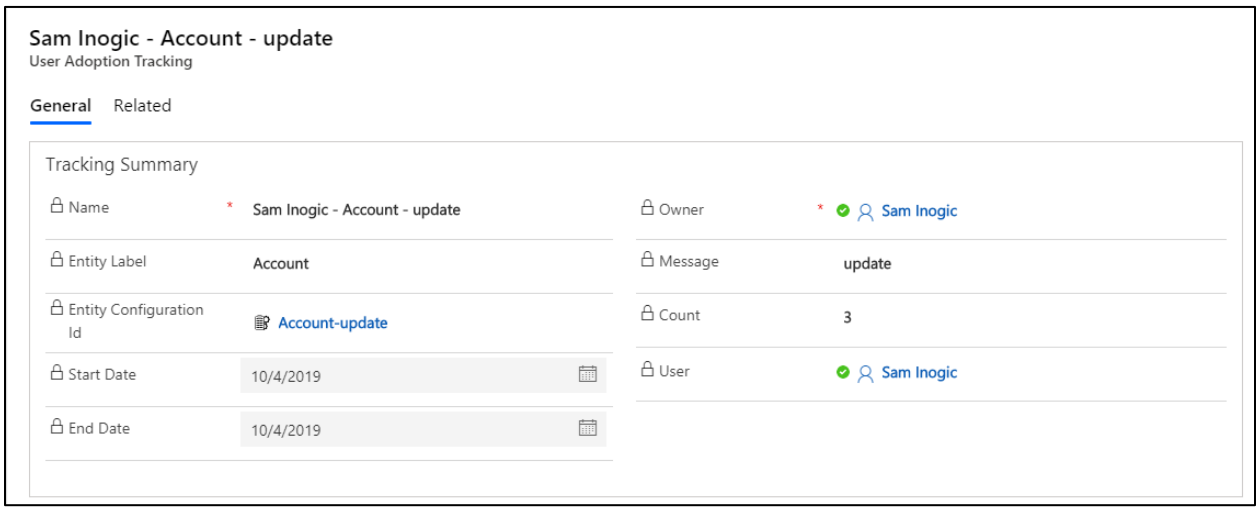


Note:

- *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

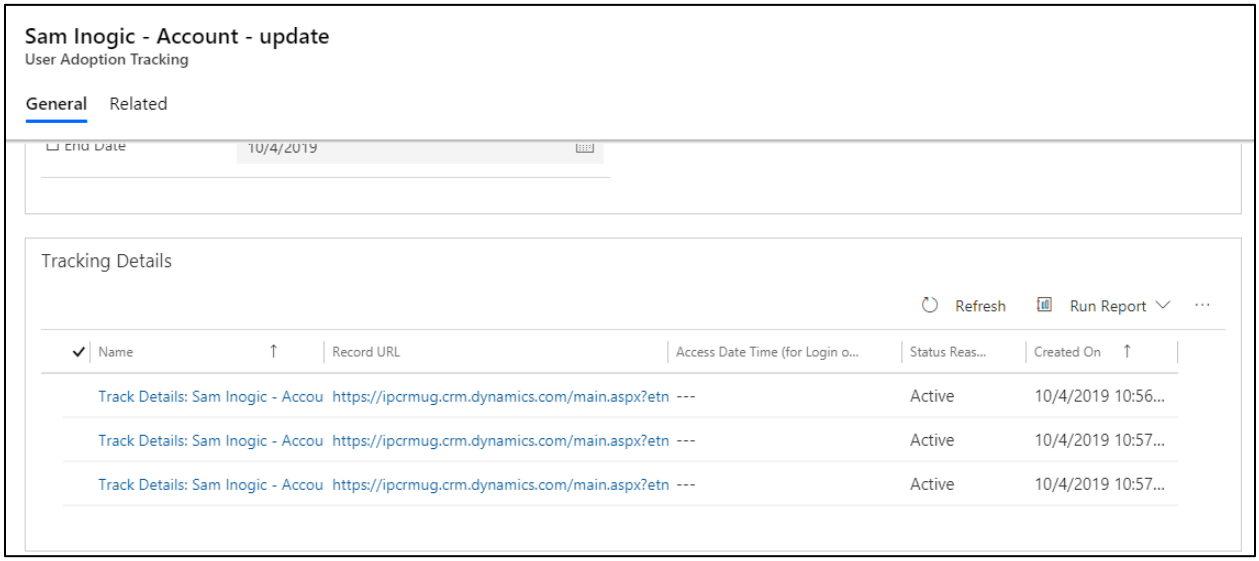
This is what a tracking record looks like;



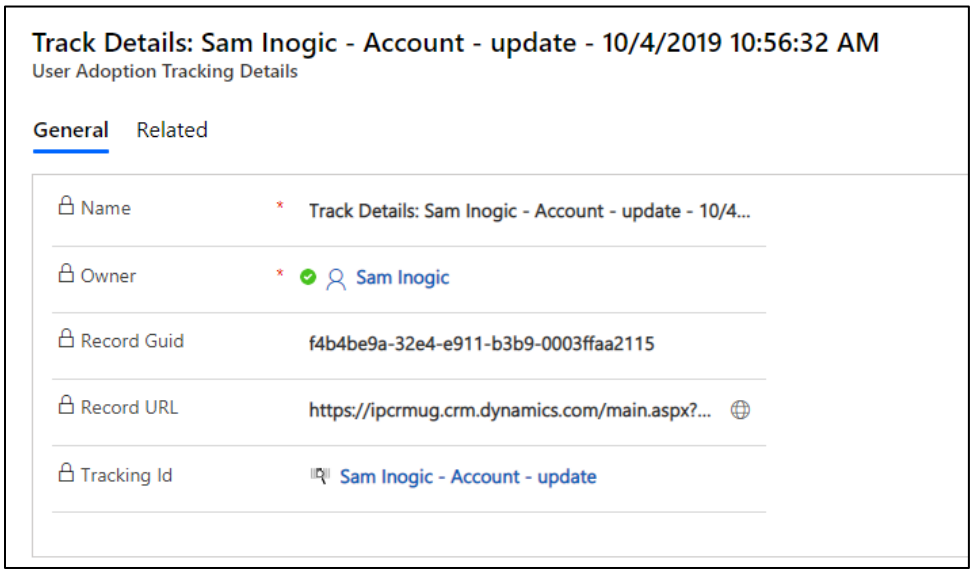
The tracking record will report on the following details of the action;

- **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;

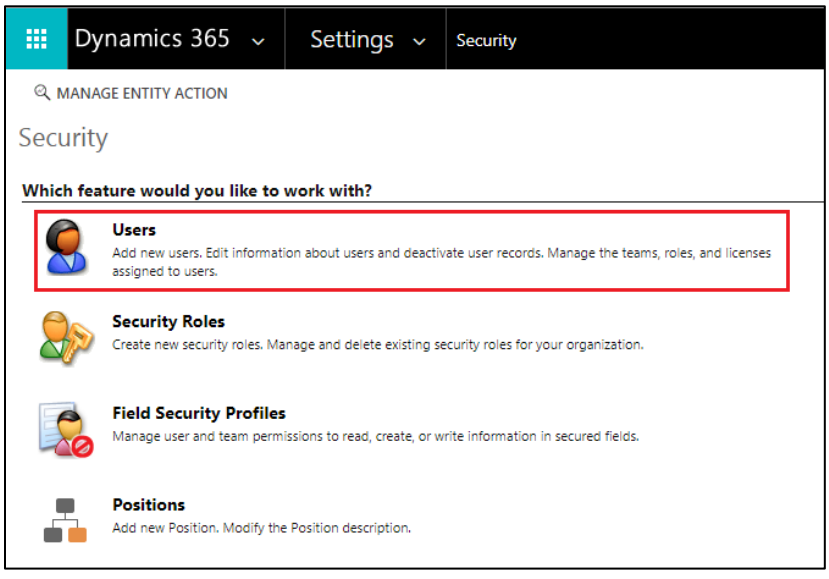


- **Record Guid**: Unique Id of the record on which the operation was performed.
- **Record URL:** Link to the record on which the operation was performed. You can click on the link to navigate to the record being tracked.

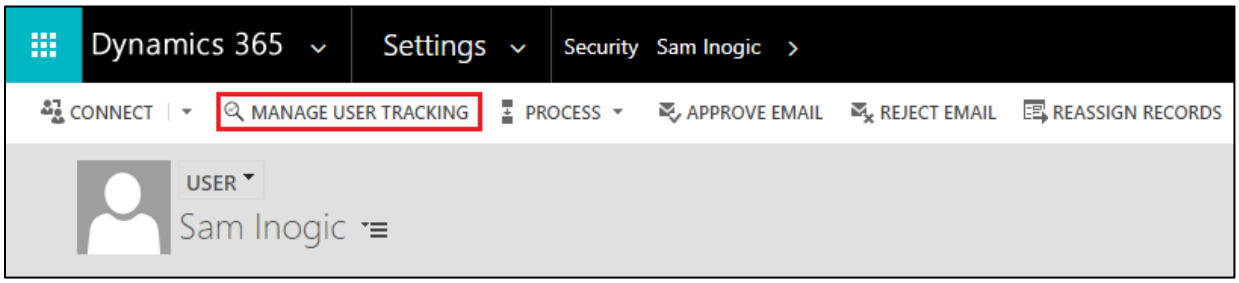
Control User Level Tracking

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

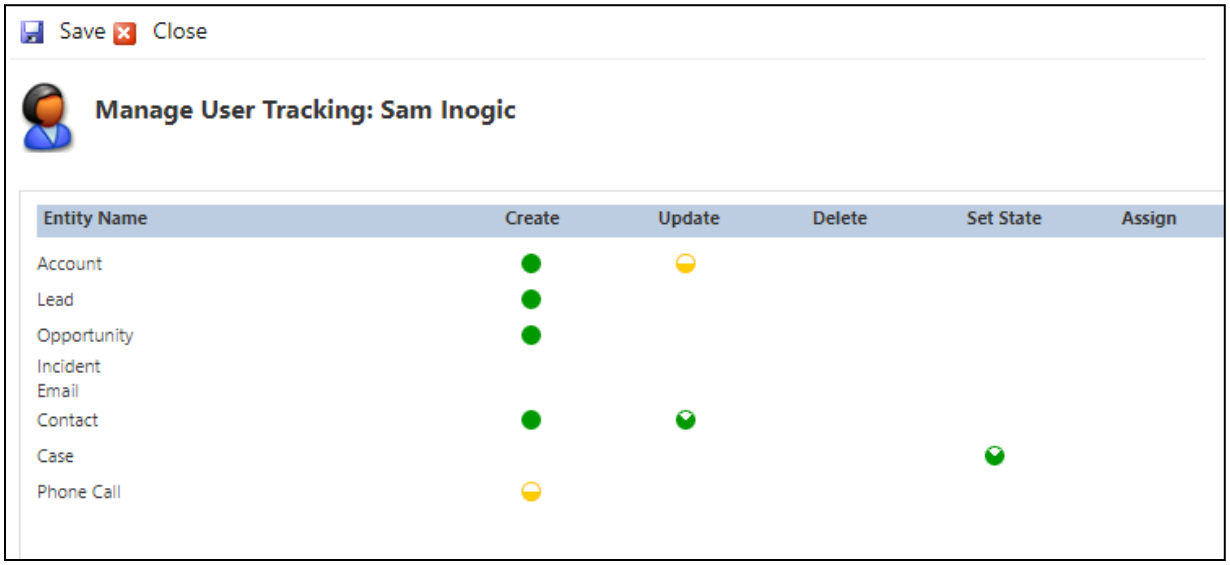
- Navigate to *Advanced Settings> Settings > Security > Users*.



- 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.

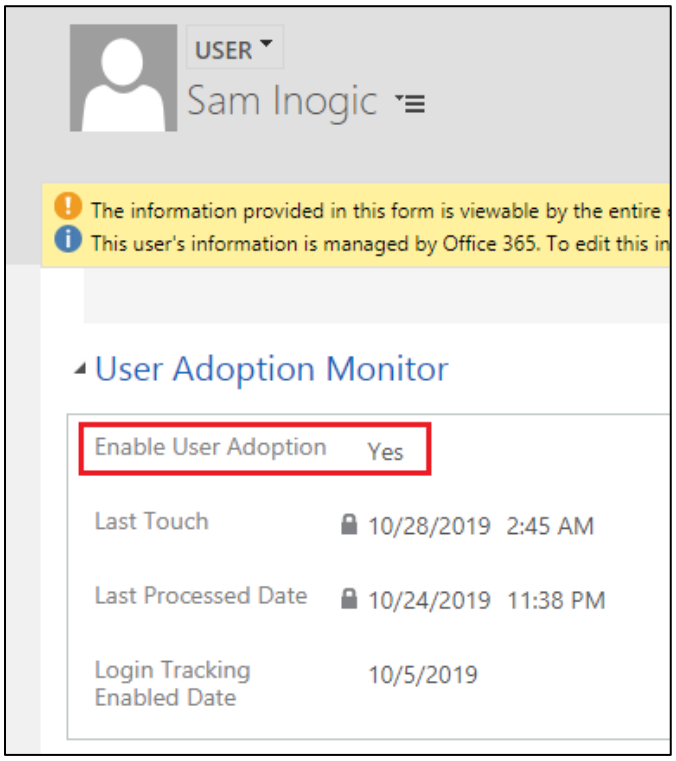
> ***Note:*** *For opportunity, we have enabled Win message/action, and since it is not available as a message/action in the UI, Opportunity will be listed here, but no options against it will be available.*

- 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.

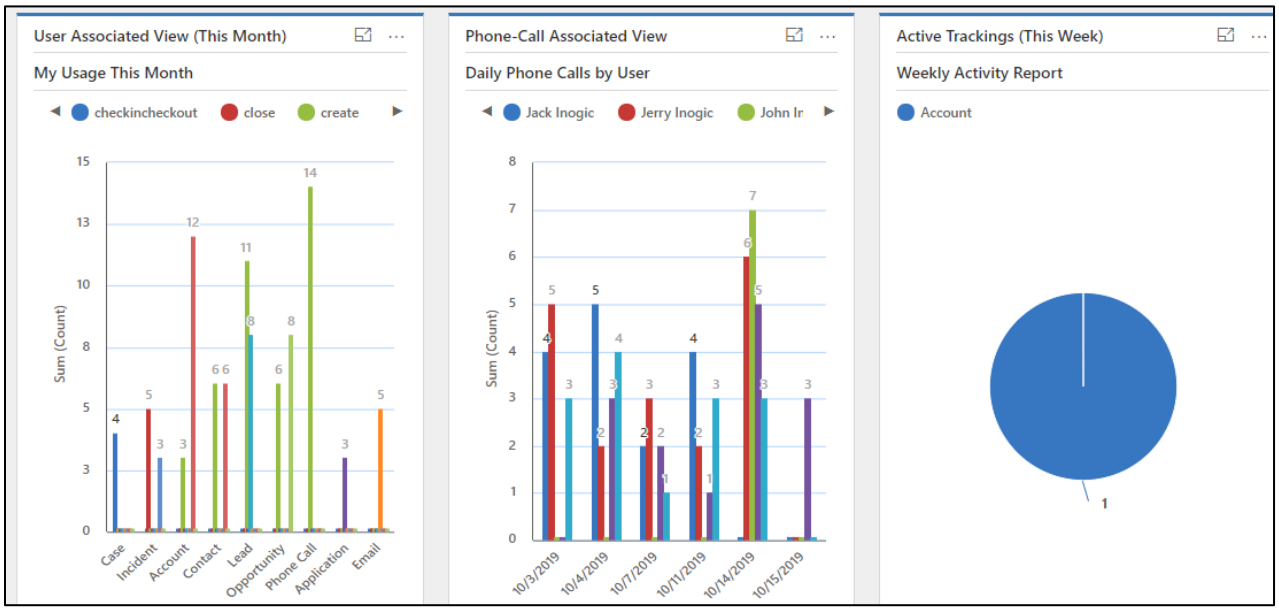


Set the *Enable User Adoption* to *No* to not track any actions of this user.

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.

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