Export to Excel Tracking – Dynamics 365

Contents

Introduction

Dynamics CRM 2016

Applies to: Dynamics 365 (online)

Export to Excel app gives the ability to track who/what/when the data is exported from the organization using the "Export to Excel" button.

What does Export to Excel Tracking App Achieves:

- Export to Excel tracking application helps us in tracking the below details whenever a user clicks on "Export to Excel" button and exports data from the organization. The below information is stored in a custom entity "Export to Excel Tracking" (msydn_exporttoexceltracking) which comes along with application package.
  Below are the details captured:
  1. User who exported the data
  2. User domain name
  3. Date & Time of data export
  4. Entity Display name for which data is exported
  5. Entity schema name
  6. View Name which is used to export data
  7. View type (personal or system)
  8. Columns selected to export the data
  9. FetchXML of the query used to export the data.

Approach

Export to Excel tracking application approach:

Whenever any user exports data in the CRM organization, be it using the default ribbon button "Export to Excel" or the "Export data" button in Advanced Find, CRM uses "Retrieve Multiple" operation in the background to fetch the records in the first before exporting them to an excel.

This "Retrieve Multiple" operation is used at lot of places in CRM organization but we can differentiate between normal operation and "Export to Excel" operation by using the message name in the Parent Context of Retrieve Multiple.

A plugin is developed and registered on "Retrieve Multiple" message and the entity is selected as "none" which means this plugin will be triggered on any entity data export.

Within the plugin, we check if the parent context message name is "ExportToExcel". If the message name in the parent context is "ExportToExcel", we get all the required values to track in the Input Argument Collection.

The plugin reads the Input Argument collection values and creates a new record in the custom entity (msdyn_exporttoexceltracking). This plugin executes whenever any user exports data from the CRM organization and tracks the user, time, entity and view details.

Sample Screenshot of the tracking record: