



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

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 a 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 the **User Adoption Monitor Administrator** or **User Adoption Monitor User** role to access the features of User Adoption Monitor solution.

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

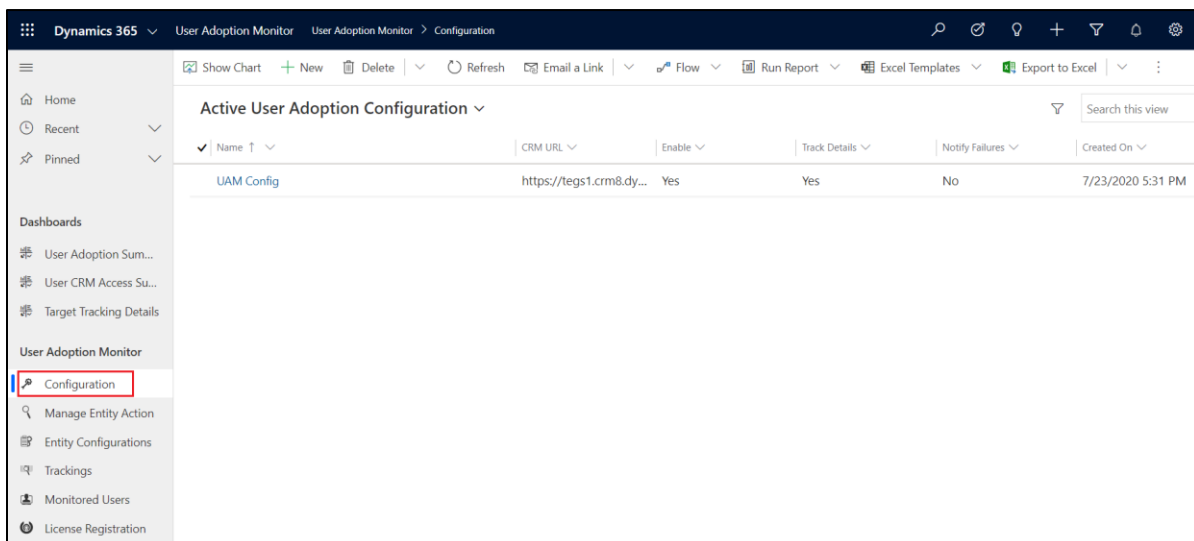
Getting Started

This section gives a general overview of the User Adoption Monitor for Dynamics CRM. The first step would be to set up the configuration if it is not created already after activating the User Adoption Monitor License.

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. Enabling this feature will send the user a daily email at 12:05 AM consisting the error logs if there are any failures at any point of time while using User Adoption Monitor.

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*.
- Once you click the *Manage Entity Action* button, a screen opens listing the most commonly used OOB Entities and Actions. It also lists all the available custom entities and actions. Apart from that, it allows you to enable tracking of the most commonly performed Actions on any entity like Create, Update, Delete and Assign.





Note: Sample entity tracking configurations are shipped and installed along with the product.

Entity Name	Create	Update	Delete	Assign
Account	●	○	○	○
Contact	●	●	○	●
Lead	●	○	○	○
Opportunity	○	○	○	○
Quote	○	○	○	○
Order	○	○	○	○
Invoice	○	○	○	○
Case	○	○	○	○
Email	○	○	○	○
Fax	●	○	○	○
Task	○	○	○	○
Phone Call	○	○	○	○
Appointment	○	○	○	○
Connection Reference	○	○	○	○
ExportSolutionUpload	○	○	○	○
Customer Voice survey	○	○	○	○
ApplicationUser	○	○	○	○
Customer Voice unsubscribed recipient	○	○	○	○
PDF Setting	○	○	○	○
ProcessStageParameter	○	○	○	○
Dismissed Notification	○	○	○	○
Notification Request	○	○	○	○
Customer Voice survey email template	○	○	○	○
Data Lake Workspace Permission	○	○	○	○
Connector	○	○	○	○

Keys: ○ - None ○ - Daily ● - Weekly ● - 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 that will be tracked and summarized on a daily basis.
 - Weekly	Represents changes that will be tracked and summarized on a weekly basis.
 - Monthly	Represents changes that will be tracked and summarized on a monthly basis.

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 quote is won (Post clicking 'Create Order').
Incident	Close	This is triggered when an Incident is closed as Resolved
List	AddListMembers	This is triggered when a new member is added to a Static Marketing List
Email	Send	This is triggered once an email is sent
Application	loginlogout	To track user log-in & log-out details
Case	* checkincheckout	To keep track of user Check-in & Check-out activities details in particular Entity records

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

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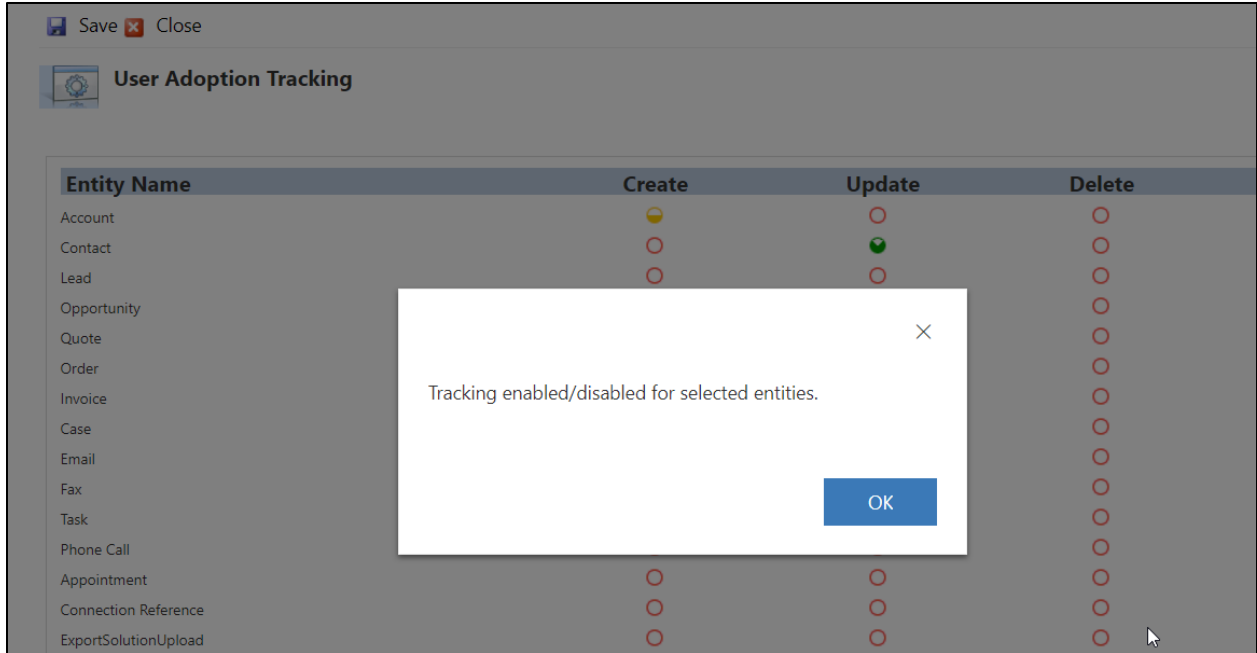
Name	Entity Label	Entity Schema	Message	Period	Created On
Account-create	Account	account	create	Daily	8/1/2020 5:28 PM
Account-delete	Account	account	delete	Weekly	8/1/2020 5:32 PM
Contact-delete	Contact	contact	delete	Daily	8/1/2020 5:32 PM
Email-send	Email	email	send	Daily	8/1/2020 5:29 PM
Incident-close	Incident	incident	close	Monthly	8/1/2020 5:29 PM
Lead-create	Lead	lead	create	Daily	8/1/2020 5:28 PM
Lead-qualifylead	Lead	lead	qualifylead	Monthly	8/1/2020 5:28 PM
List-addlistmembers	List	list	addlistmembers	Daily	8/1/2020 5:29 PM
Opportunity-delete	Opportunity	opportunity	delete	Daily	8/1/2020 5:32 PM
Opportunity-update	Opportunity	opportunity	update	Daily	8/1/2020 5:32 PM
Opportunity-win	Opportunity	opportunity	win	Monthly	8/1/2020 5:28 PM
Phone Call-create	Phone Call	phonecall	create	Daily	8/1/2020 5:28 PM
Quote-close	Quote	quote	close	Monthly	8/1/2020 5:28 PM
Quote-win	Quote	quote	win	Monthly	8/1/2020 5:28 PM

Example for Entity Tracking

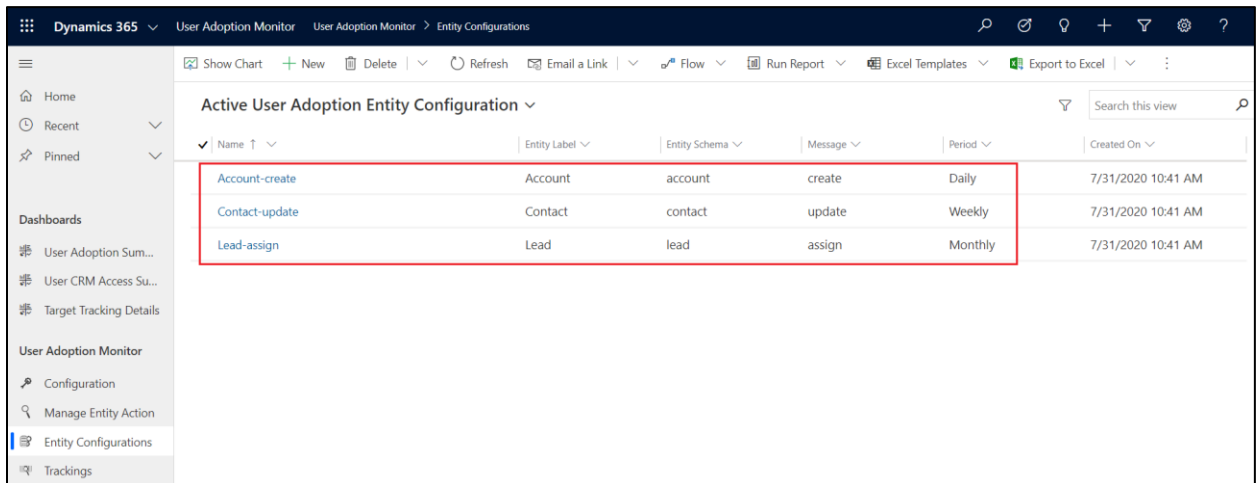
- Here we have enabled tracking for the following entities:
 - For Account: Set 'Create' to period 'Daily'
 - For Contact: Set 'Update' to 'Weekly'
 - For Lead: Set 'Assign' to 'Monthly'

Entity Name	Create	Update	Delete	Assign
Account	☺	○	○	○
Contact	○	☑	○	○
Lead	○	○	○	●

- 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** section of User Adoption Monitor.



- With these entity configurations, the respective entity actions will be tracked as shown below:

For Account – Create (Daily)

Account-create
User Adoption Entity Configuration

General Related

Trackings Refresh Run Report

Name	Total	Target	User	Start Date	End Date	Created On
Thomas Perry - Account - create	1.00	---	Thomas Perry	7/31/2020	7/31/2020	7/31/2020 11:00 ...

For Contact – Update (Weekly)

Contact-update
User Adoption Entity Configuration

General Related

Trackings Refresh Run Report

Name	Total	Target	User	Start Date	End Date	Created On
Thomas Perry - Contact - update	1.00	---	Thomas Perry	7/26/2020	8/1/2020	7/31/2020 11:05 ...

For Lead – Assign (Monthly)

Lead-assign
User Adoption Entity Configuration

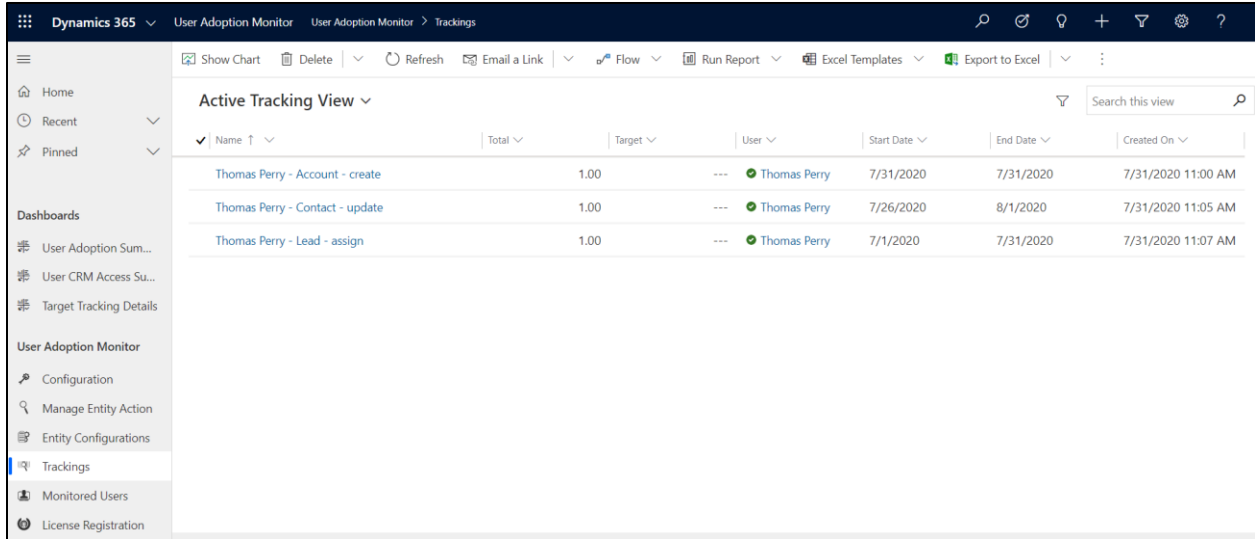
General Related

Trackings Refresh Run Report

Name	Total	Target	User	Start Date	End Date	Created On
Thomas Perry - Lead - assign	1.00	---	Thomas Perry	7/1/2020	7/31/2020	7/31/2020 11:07 ...

The above tracking actions would also appear under 'Trackings' all together:

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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..., Target Tracking Details), User Adoption Monitor (Configuration, Manage Entity Action, Entity Configurations, **Trackings**, Monitored Users, License Registration), and a search bar. The main area displays the 'Active Tracking View' table with columns: Name, Total, Target, User, Start Date, End Date, and Created On. The table contains three rows of tracking data for user Thomas Perry.

Name	Total	Target	User	Start Date	End Date	Created On
Thomas Perry - Account - create	1.00	---	Thomas Perry	7/31/2020	7/31/2020	7/31/2020 11:00 AM
Thomas Perry - Contact - update	1.00	---	Thomas Perry	7/26/2020	8/1/2020	7/31/2020 11:05 AM
Thomas Perry - Lead - assign	1.00	---	Thomas Perry	7/1/2020	7/31/2020	7/31/2020 11:07 AM

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.

CRM Access Tracking

CRM Access Tracking is a feature to track access of the Dynamics CRM users. It enables the managers to monitor the CRM access of their team members by tracking various web activities performed by them in the CRM manually.

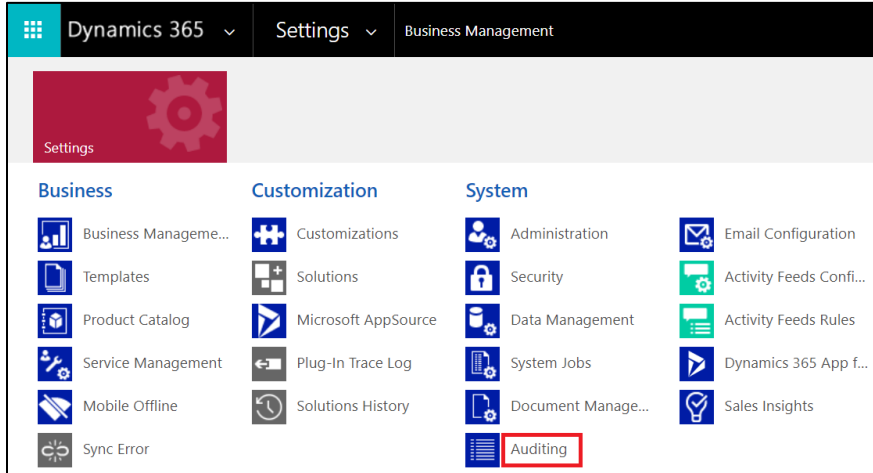
Note: This feature doesn't give the actual daily login count of a CRM user. It instead provides brief detail on the number of times a user accesses a CRM.

STEPS TO TRACK USER'S CRM ACCESS

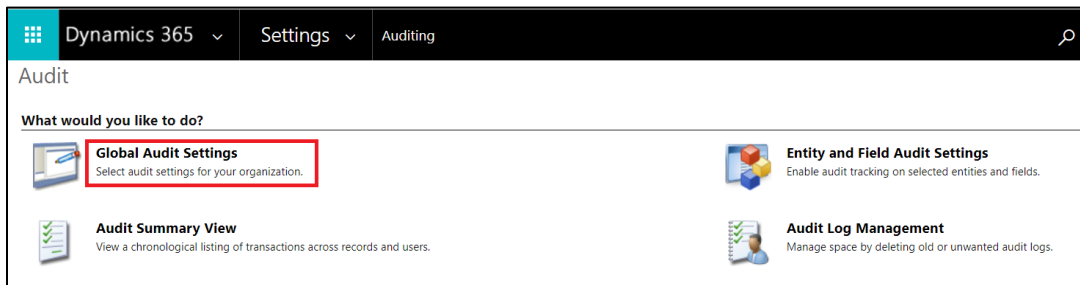
1) The first step to track user's CRM Access is to **Enable Auditing**. For this, follow the below steps given below:

- Navigate to Settings -> Auditing (under '**System**' group)

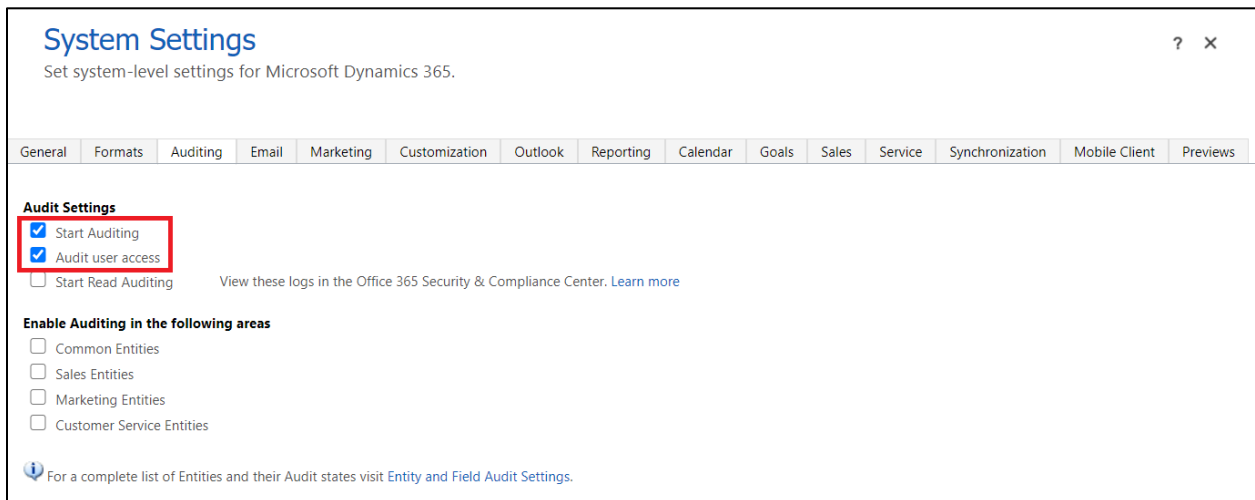
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- It opens Audit window as shown below. Click on **'Global Audit Settings'**.



- Click on **'Auditing'** tab. Check **'Start Auditing'** and **'Audit user Access'** settings as shown below.



2) Create a **'User Adoption Entity Configuration'** record for user login as follows:

- Navigate to User Adoption Monitor App -> Entity Configurations (under 'User Adoption Monitor' group)

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

Note: Whether the entity configuration record has already been created or not can be verified from the Entity Configurations home view.

Name	Entity Label	Entity Schema	Message	Period	Created On
Contact-delete	Contact	contact	delete	Daily	8/1/2020 5:32 PM
Email-send	Email	email	send	Daily	8/1/2020 5:29 PM
Incident-close	Incident	incident	close	Monthly	8/1/2020 5:29 PM
Lead-create	Lead	lead	create	Daily	8/1/2020 5:28 PM
Lead-qualifylead	Lead	lead	qualifylead	Monthly	8/1/2020 5:28 PM
List-addlistmembers	List	list	addlistmembers	Daily	8/1/2020 5:29 PM
Opportunity-delete	Opportunity	opportunity	delete	Daily	8/1/2020 5:32 PM
Opportunity-update	Opportunity	opportunity	update	Daily	8/1/2020 5:32 PM
Opportunity-win	Opportunity	opportunity	win	Monthly	8/1/2020 5:28 PM
Phone Call-create	Phone Call	phonecall	create	Daily	8/1/2020 5:28 PM
Quote-close	Quote	quote	close	Monthly	8/1/2020 5:28 PM
Quote-win	Quote	quote	win	Monthly	8/1/2020 5:28 PM
systemuser-login	systemuser	systemuser	login	Daily	8/5/2020 6:40 AM

The User Adoption Entity Configuration record should always be created with the following attributes as shown in the screenshot below.

- **Entity Label:** “systemuser”
- **Entity Schema:** “systemuser”
- **Message:** “login”
- **Period:** “Daily”
- **Polling:** Select the interval period after which tracking will be conducted.
- **Preferred Start Time:** Select the time to start the tracking.

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The screenshot shows the Dynamics 365 interface for the 'systemuser-login' entity configuration. The breadcrumb trail is 'Dynamics 365 > User Adoption Monitor > User Adoption Monitor > Entity Configurations > systemuser-login'. The left navigation pane includes 'Home', 'Recent', 'Pinned', 'Dashboards', and 'User Adoption Monitor'. The main content area shows the 'General' tab for the 'systemuser-login' entity configuration. The configuration details are as follows:

Field	Value	Field	Value
Name	systemuser-login	Owner	Nadin Hathway
Entity Label	systemuser	Message	login
Entity Schema	systemuser	Period	Daily
Polling	Every 4 Hours	Preferred Start Time	09:00

Note: The period should always be selected as 'Daily' as this feature only works for daily tracking.

- Once the Entity Configuration record is created, the User Adoption Monitor will track the CRM Access of each logged in user. The tracking details can be reviewed either from the 'systemuser-login' entity configuration record as below or by navigating to the **Settings -> User Adoption Monitor -> Trackings**.

The screenshot shows the Dynamics 365 interface for the 'systemuser-login' entity configuration, with the 'Trackings' view selected. The breadcrumb trail is 'Dynamics 365 > User Adoption Monitor > User Adoption Monitor > Entity Configurations > systemuser-login'. The left navigation pane includes 'Home', 'Recent', 'Pinned', 'Dashboards', 'User Adoption Monitor', and 'Trackings'. The main content area shows the 'General' tab for the 'systemuser-login' entity configuration. Below the configuration details, the 'Trackings' view is displayed with a table of tracking records. The table has the following columns: Name, Total, Target, User, Start Date, End Date, and Created On. The data is as follows:

Name	Total	Target	User	Start Date	End Date	Created On
InoLink Service Account - systemuser - login	3.00	---	InoLink Service Ac	8/6/2020	8/6/2020	8/6/2020 1:01 PM
Nadin Hathway - systemuser - login	27.00	---	Nadin Hathway	8/6/2020	8/6/2020	8/6/2020 9:01 AM

From this 'Trackings' view we can find the number of times a respective user has accessed the CRM by date.

- We can see exact time at which CRM users have accessed the CRM by opening the 'Trackings' record as shown below:

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The screenshot shows the Dynamics 365 User Adoption Monitor interface. The main view is for 'Nadin Hathway - systemuser - login'. The 'General' tab is active, displaying the following information:

- Entity Label: systemuser
- User: Nadin Hathway
- Target: ---
- Start Date: 8/6/2020
- End Date: 8/6/2020
- Message: login
- Total: 27.00

Below this, the 'Tracking Details' section shows a table of login events:

Name	Record URL	Access Date Time (for Login only)	Status Reason	Created On
Track Details: Nadin Hathway - system	https://tegs1.crm8.dynamics.com/main.aspx?etn=system	8/6/2020 7:38 AM	Active	8/6/2020 9:01 AM
Track Details: Nadin Hathway - system	https://tegs1.crm8.dynamics.com/main.aspx?etn=system	8/6/2020 7:37 AM	Active	8/6/2020 9:01 AM
Track Details: Nadin Hathway - system	https://tegs1.crm8.dynamics.com/main.aspx?etn=system	8/6/2020 7:20 AM	Active	8/6/2020 9:01 AM

- User Adoption Monitor gets shipped with the ‘User CRM Access Summary’ dashboard to view the CRM user’s access summary at a glance.

The ‘User CRM Access Summary’ dashboard can be viewed under the System dashboards area.

The screenshot shows the Dynamics 365 System Dashboards area. The 'User CRM Access Summary' dashboard is highlighted in the navigation pane. The main view displays a bar chart titled 'CRM accessed by Users in this week'.

The chart shows the count of non-empty entries for four users over a period of 5 days starting from 10/26/2017. The data is as follows:

User	Count
Emilla Joseph	1
Mark Taylor	1
Eric Mandis	1
Chris Xavier	1

Note: This dashboard is visible to only user who has any one of the following security roles - System Administrator, System Customizer or User Adoption Monitor Administrator.

Log In & Log Out Entity Configuration

Note: Either 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/weekly/monthly 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.

The screenshot shows the 'New User Adoption Entity Configuration' form. The 'General' tab is active. The form contains the following fields:

Name	---	Owner	* Nadin Hathway
Entity Label	* ---	Message	* ---
Entity Schema	* ---	Period	* ---

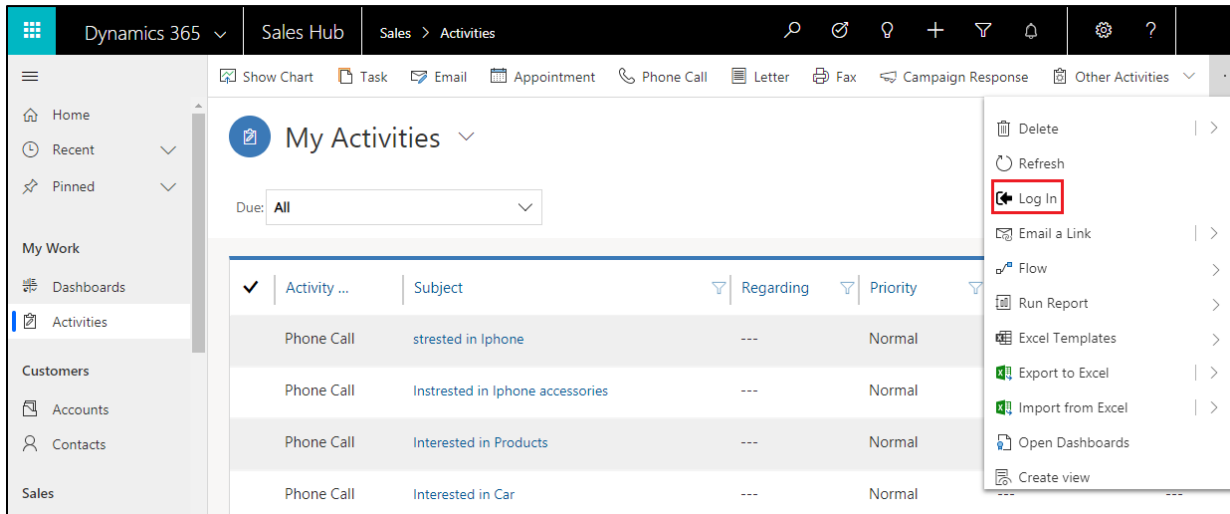
- Here, fill the fields as follows:
 - **Entity Label:** Application
 - **Entity Schema:** application
 - **Message:** loginlogout
 - **Period:** as required (Daily in this instance)
- Click on Save.

The screenshot shows the 'Application-loginlogout' form. The 'General' tab is active. The form contains the following fields:

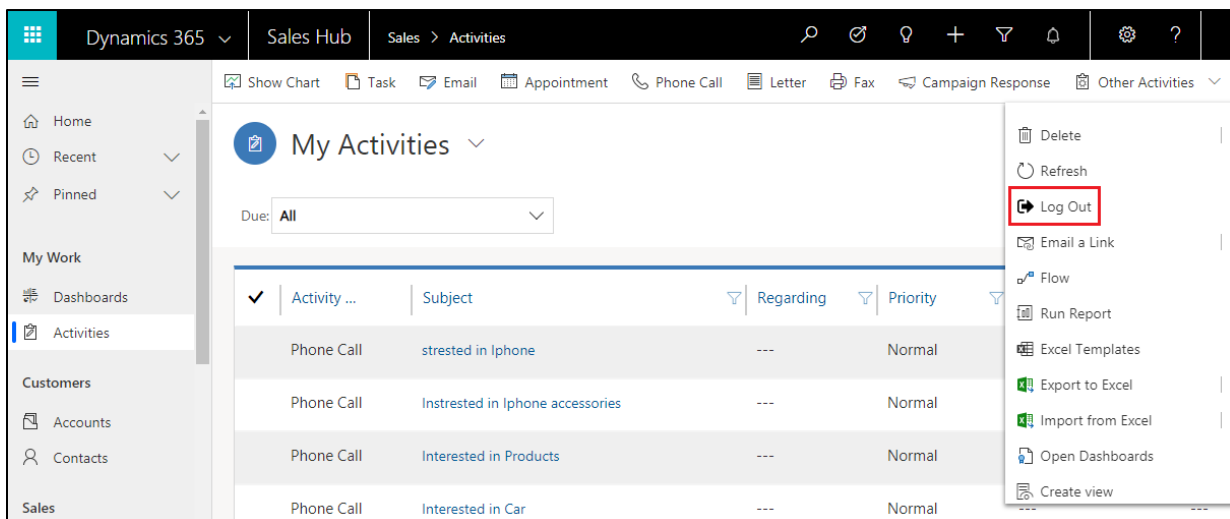
Name	Application-loginlogout	Owner	* Nadin Hathway
Entity Label	* Application	Message	* loginlogout
Entity Schema	* application	Period	* Daily

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- 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 user finishes working in the CRM 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.

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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

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

Tracking Details

Refresh Run Report

Name	Record URL	Access Date Time (for Login only)	Status Reason	Created On
Track Details: Nadin Hathway - Applicatic	https://tegs1.crm8.dynamics.com/main.aspx?etn=syster	---	Login	8/6/2020 3:03 PM
Track Details: Nadin Hathway - Applicatic	https://tegs1.crm8.dynamics.com/main.aspx?etn=syster	---	Logout	8/6/2020 3:09 PM
Track Details: Nadin Hathway - Applicatic	https://tegs1.crm8.dynamics.com/main.aspx?etn=syster	---	Login	8/6/2020 8:57 PM
Track Details: Nadin Hathway - Applicatic	https://tegs1.crm8.dynamics.com/main.aspx?etn=syster	---	Logout	8/6/2020 8:57 PM

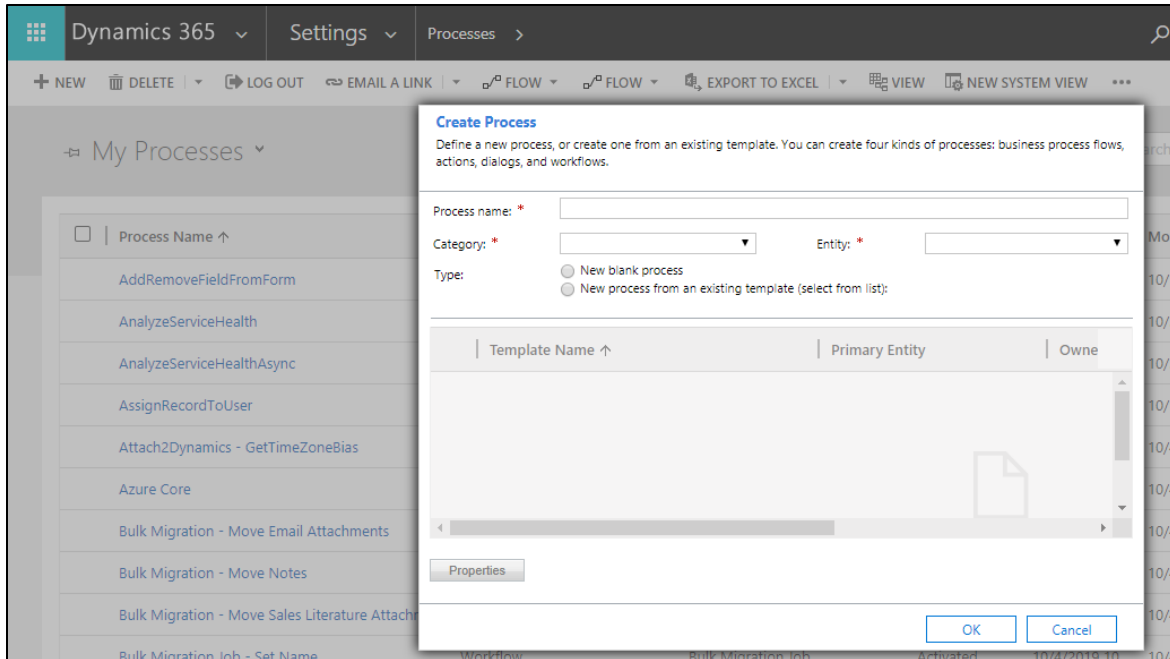
Check-in & Check-out Entity Configuration

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

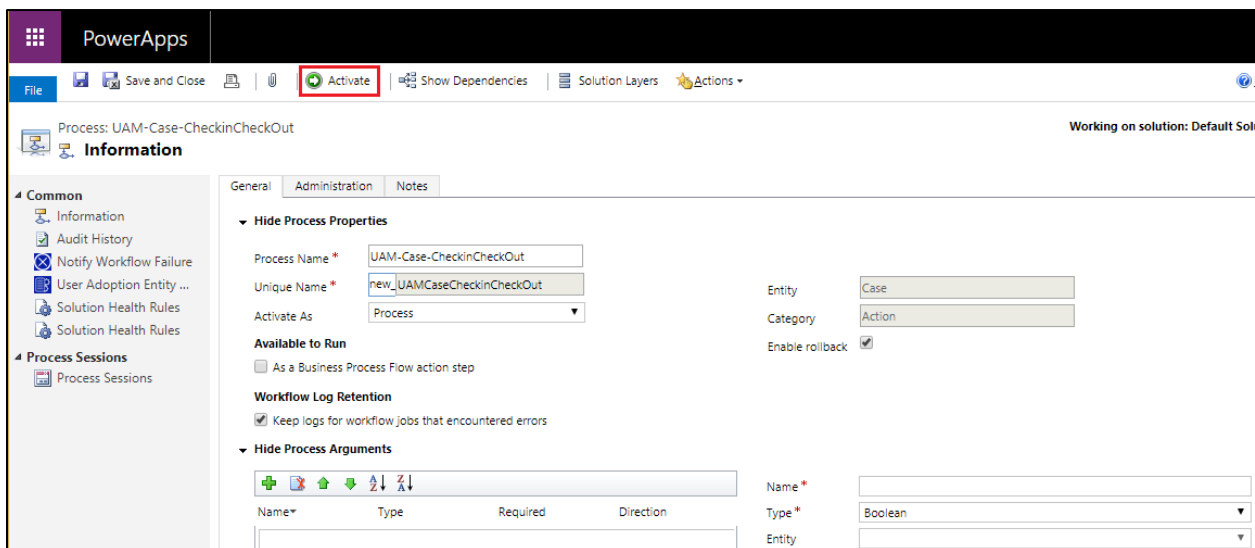
With this feature you can keep track of records that each user worked on. It will specify the time spent by user on records in a particular Entity. In order to enable Check-in & Check-out feature for a particular entity, follow the steps given below:

- 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.

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- 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.

The screenshot shows the 'New User Adoption Entity Configuration' form in the 'General' tab. The form has a dark blue header with the title 'User Adoption Monitor' and navigation icons. Below the header, there are menu items: 'Save', 'Save & Close', '+ New', and 'Flow'. The main content area is titled 'New User Adoption Entity Configuration' and has a 'General' sub-tab. The form contains several fields: 'Name' (empty), 'Entity Label' (empty), 'Entity Schema' (empty), 'Owner' (populated with 'Nadin Hathway'), 'Message' (empty), and 'Period' (empty). There are red asterisks next to the 'Entity Label', 'Entity Schema', 'Message', and 'Period' fields, indicating they are required.

- 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.

The screenshot shows the 'New User Adoption Entity Configuration' form in the 'General' tab after saving. The 'Save' button in the top left corner is highlighted with a red box. The form fields are now populated: 'Name' (empty), 'Entity Label' (Case), 'Entity Schema' (incident), 'Owner' (Nadin Hathway), 'Message' (checkincheckout), 'Period' (Daily), and 'Action Name' (Case - CheckinCheckOut). There are red asterisks next to the 'Entity Label', 'Entity Schema', 'Message', 'Period', and 'Action Name' fields, indicating they are required.

- Now go to a particular record in Case entity. Here, you will see the Check-in button. Click on the same before you start working on the record.

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The screenshot shows the Dynamics 365 interface for a case titled 'Repair AC'. The case is in the 'Identify (17 D)' stage of the 'Phone to Case Process'. The 'Check In' button is highlighted in the right-hand menu.

Case Details:

Field	Value
Case Title	Repair AC
ID	CAS-01002-P5X2Y6
Subject	---
Customer	55 Twin Lane

Timeline:

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

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

The screenshot shows the Dynamics 365 interface for a case titled 'Repair AC'. The case is in the 'Identify (17 D)' stage of the 'Phone to Case Process'. The 'Check Out' button is highlighted in the right-hand menu.

Case Details:

Field	Value
Case Title	Repair AC
ID	CAS-01002-P5X2Y6
Subject	---
Customer	55 Twin Lane

Timeline:

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

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

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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

- 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 Login only)	Status Reason	Created On
Track Details: Nadin Hathway - Case - r	https://tegs1.crm8.dynamics.com/main.aspx?etn=incide	---	Checkin	8/6/2020 5:33 PM
Track Details: Nadin Hathway - Case - r	https://tegs1.crm8.dynamics.com/main.aspx?etn=incide	---	Checkout	8/6/2020 5:33 PM
Track Details: Nadin Hathway - Case - r	https://tegs1.crm8.dynamics.com/main.aspx?etn=incide	---	Checkin	8/6/2020 9:25 PM
Track Details: Nadin Hathway - Case - r	https://tegs1.crm8.dynamics.com/main.aspx?etn=incide	---	Checkout	8/6/2020 9:28 PM
Track Details: Nadin Hathway - Case - r	https://tegs1.crm8.dynamics.com/main.aspx?etn=incide	---	Checkin	8/6/2020 9:29 PM

1 - 5 of 6 (0 selected) Page 1

Aggregate Tracking Configuration

Using **'Aggregate Tracking'**, one can track the aggregations of respective numeric field(s) of the entity on which the specific user action has been defined. To understand better, let's take an example of **'Opportunity-win'** action.

In order to configure **'Aggregate Tracking'** follow the steps given below:

- Navigate to User Adoption Monitor App → Entity Configuration → Click on New.

The screenshot shows the 'New User Adoption Entity Configuration' form. The left sidebar contains a menu with 'Entity Configurations' highlighted. The form has a 'General' tab and the following fields:

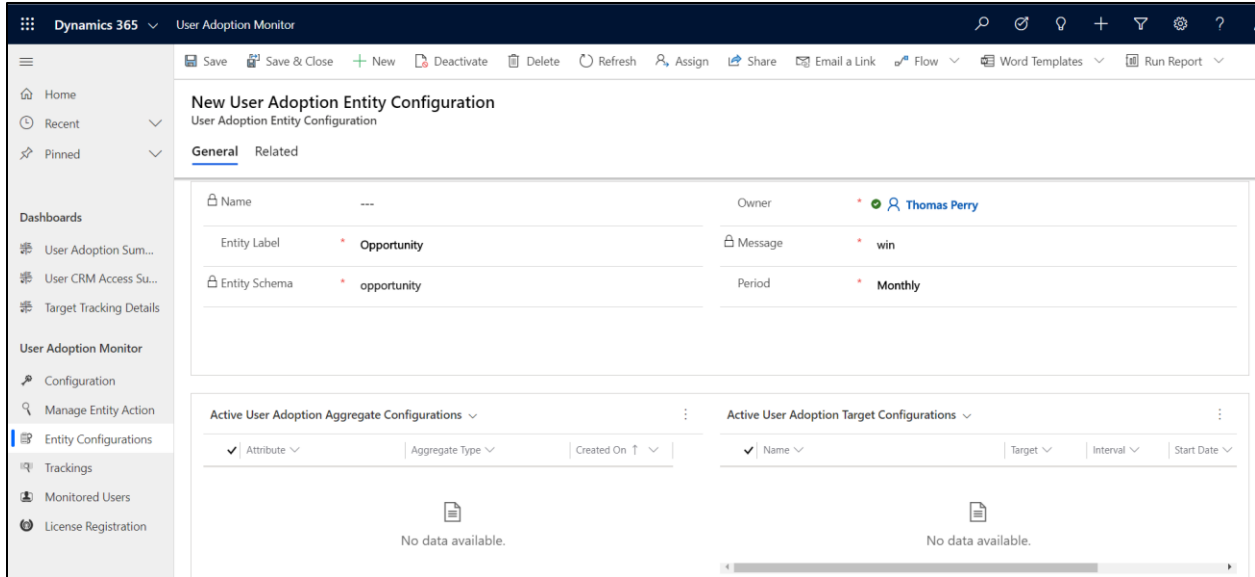
Name	---	Owner	* Thomas Perry
Entity Label	* ---	Message	* ---
Entity Schema	* ---	Period	* ---

- Fill the given fields → Click on Save.
 - a. **Entity label:** Opportunity
 - b. **Entity Schema:** opportunity
 - c. **Message:** win
 - d. **Period:** Select either Daily, Weekly or Monthly.

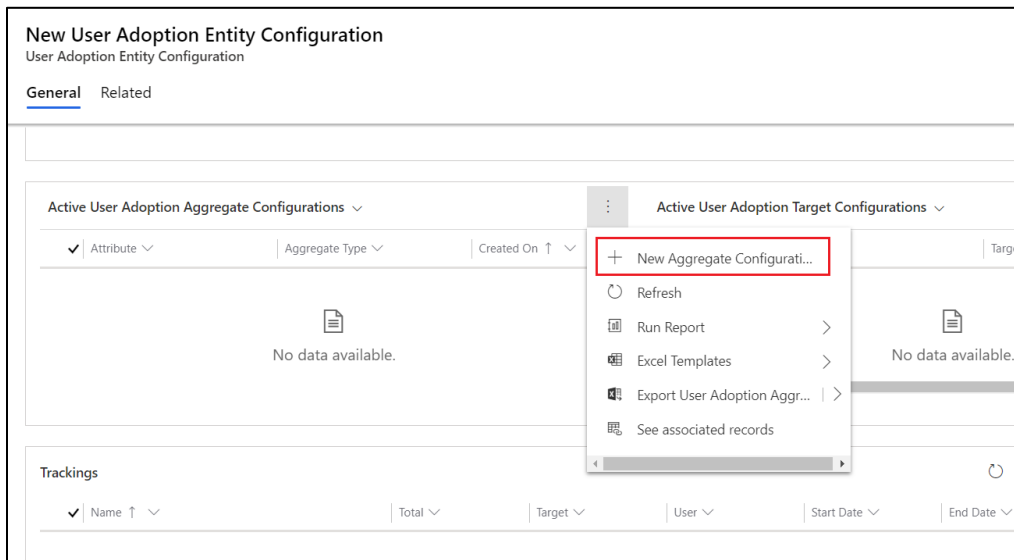
Note: *If the respective entity configuration is already present, then no need to follow the above steps to recreate the same entity configuration. One can directly open the entity configuration record and follow the below procedure to define the Aggregate Configuration.*

Once it is saved, the sub-grids to define the **Aggregate Configurations** and **Target Configurations** will be displayed.

User Adoption Monitor - User Manual



- Create a new **Aggregate Configuration** as shown below.

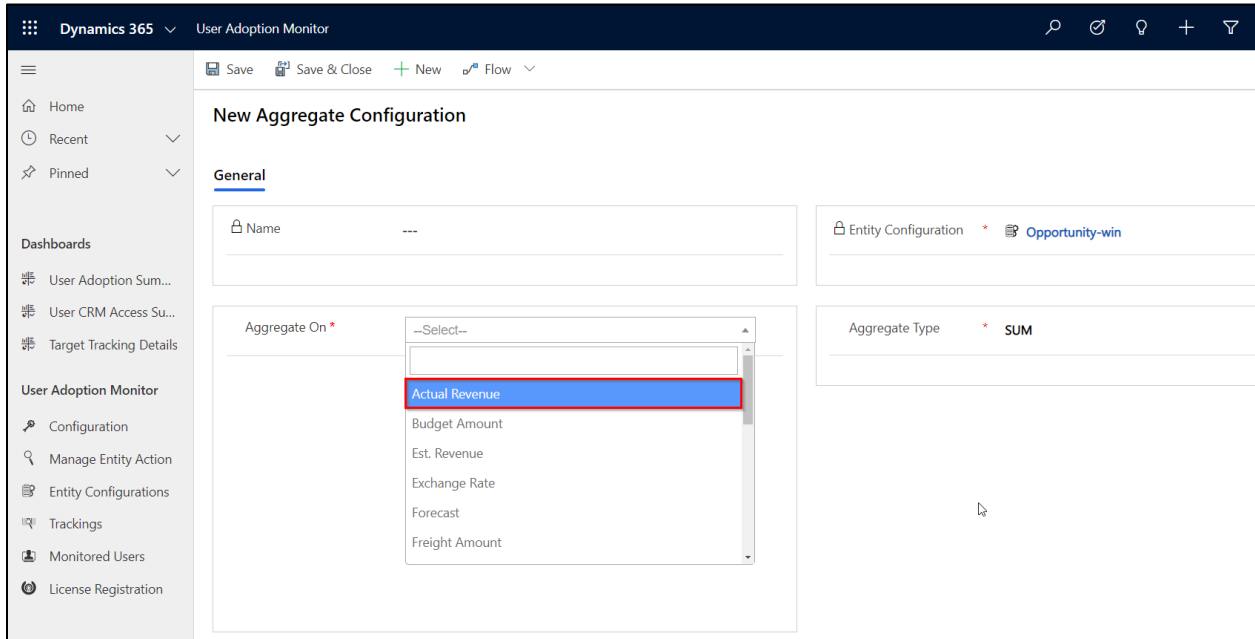


- Fill the following fields → Click on Save.
 - a. **Aggregate On:** Select any attribute from the dropdown on which you want to calculate the aggregation.
 - b. **Aggregate Type:** Select '**SUM**' or '**AVG**'. This field will calculate the aggregation as Sum or Average of the chosen field.

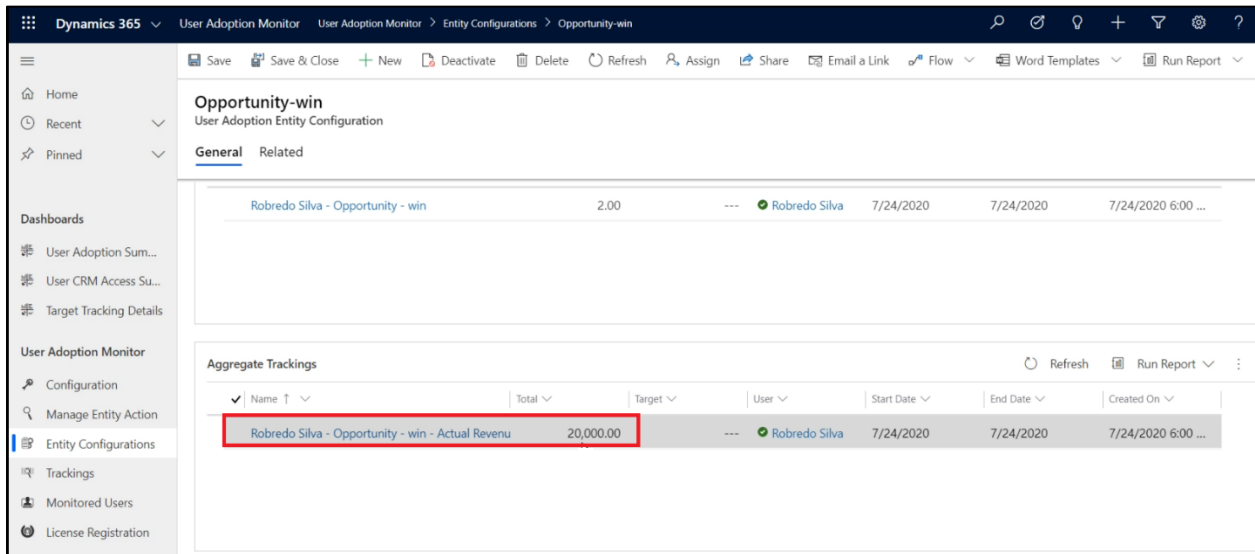
Let's take the following example:

- **Aggregate On** = Actual Revenue
- **Aggregate Type** = SUM

User Adoption Monitor - User Manual



- Once this is configured, every time a user wins an opportunity, User Adoption Monitor will calculate and show the sum of the actual revenue of Opportunities won by the respective users on daily, weekly or monthly basis.



In addition to this, there is another functionality incorporated in User Adoption Monitor that gives the provision to calculate the aggregation for specific statuses of the entity record on **'Update'** entity action.

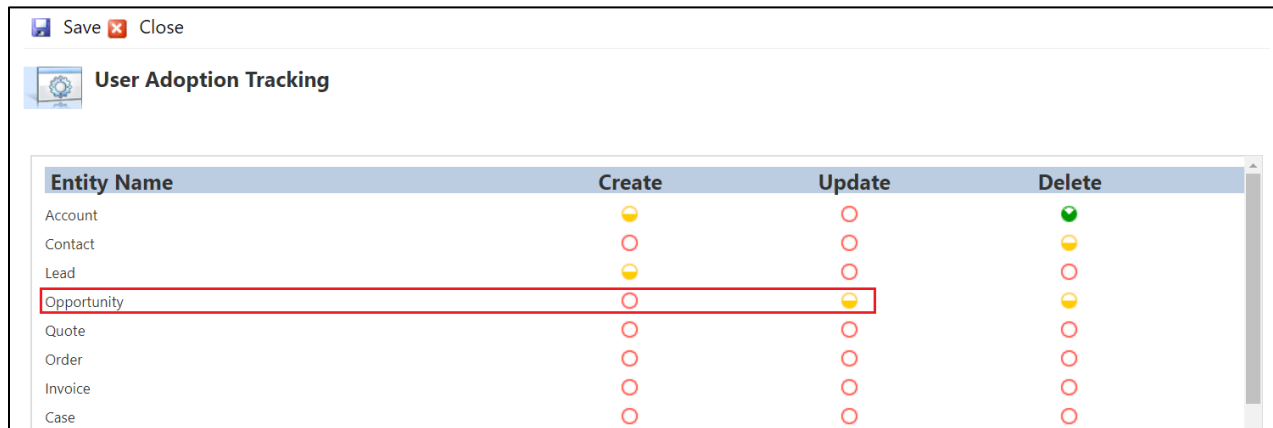
For better understanding, let's consider the following business scenario:

User Adoption Monitor - User Manual

Admin/user having 'User Adoption Monitor Administrator' privileges wants User Adoption Monitor to track the aggregation on updating the opportunity record only when the status of an opportunity is 'In progress'.

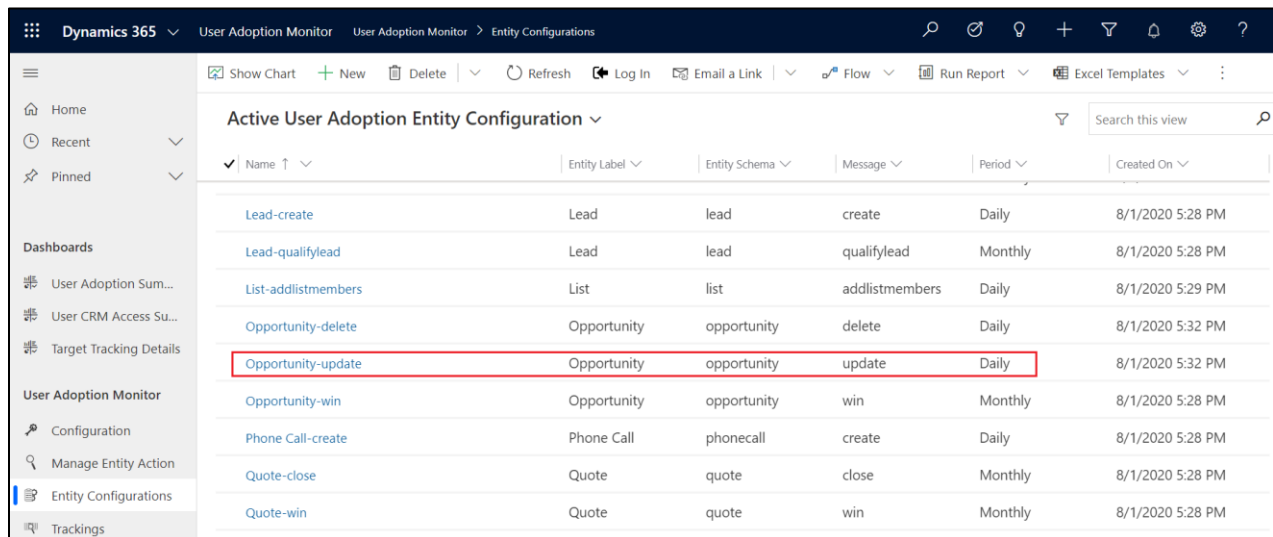
Let's follow the below steps to accomplish the above requirement.

- Navigate to Manage Entity Action → Set the period as required for **opportunity-update** action (It is set to 'Daily' in this example).



Entity Name	Create	Update	Delete
Account	●	○	●
Contact	○	○	●
Lead	●	○	○
Opportunity	○	●	●
Quote	○	○	○
Order	○	○	○
Invoice	○	○	○
Case	○	○	○

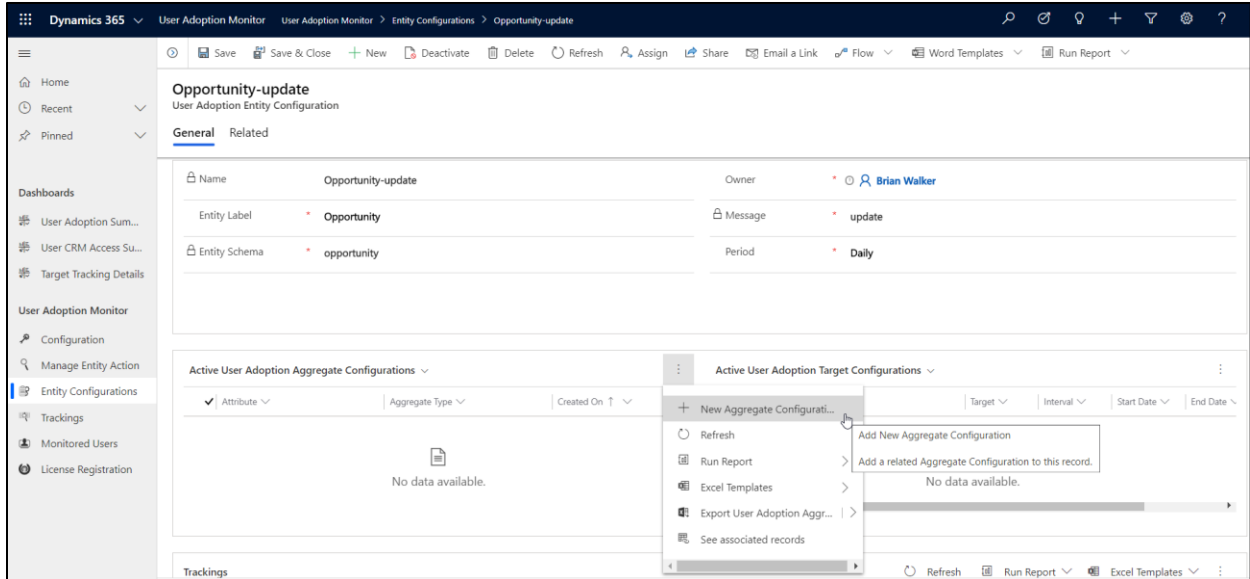
- Click on Save.
- Once the above entity action is saved successfully, you will see the '**Opportunity-update**' entity configuration created under 'Active User Adoption Entity Configuration'.



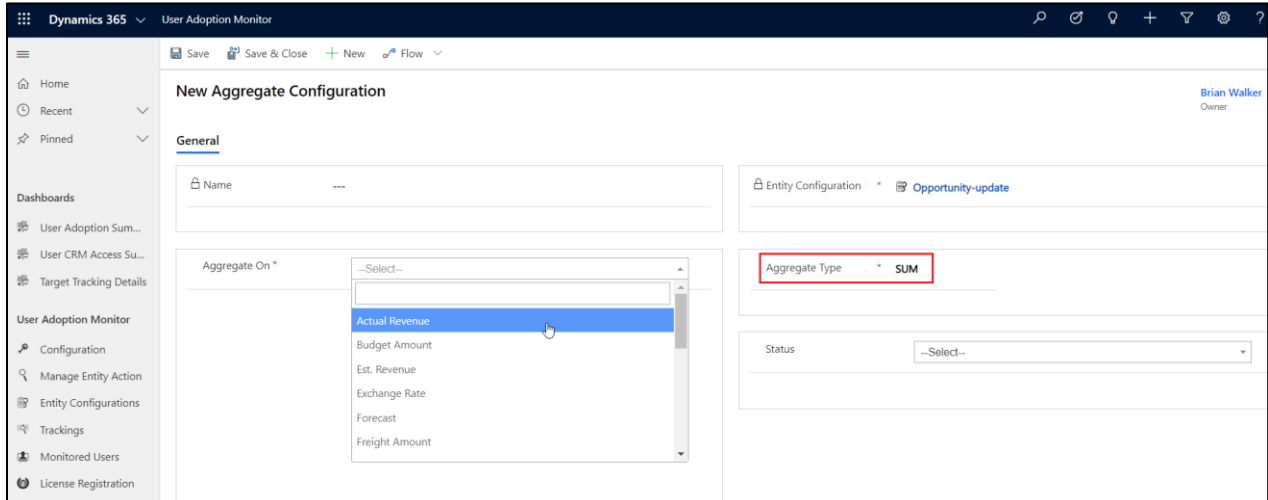
Name	Entity Label	Entity Schema	Message	Period	Created On
Lead-create	Lead	lead	create	Daily	8/1/2020 5:28 PM
Lead-qualifylead	Lead	lead	qualifylead	Monthly	8/1/2020 5:28 PM
List-addlistmembers	List	list	addlistmembers	Daily	8/1/2020 5:29 PM
Opportunity-delete	Opportunity	opportunity	delete	Daily	8/1/2020 5:32 PM
Opportunity-update	Opportunity	opportunity	update	Daily	8/1/2020 5:32 PM
Opportunity-win	Opportunity	opportunity	win	Monthly	8/1/2020 5:28 PM
Phone Call-create	Phone Call	phonecall	create	Daily	8/1/2020 5:28 PM
Quote-close	Quote	quote	close	Monthly	8/1/2020 5:28 PM
Quote-win	Quote	quote	win	Monthly	8/1/2020 5:28 PM

- Open this '**Opportunity-update**' configuration and create a new '**Aggregate Configuration**' as shown below:

User Adoption Monitor - User Manual



- Select the required attribute from the list. Here, user can pick any attribute based on the business requirement. 'Actual Revenue' attribute is selected in this example as we want User Adoption Monitor to calculate and track the aggregate value of this field upon updating the opportunity record.
- We are keeping the 'Aggregate Type' as 'SUM' since we want to calculate the sum of actual revenue of total number of opportunities that are won.



- Select the status as '**Open – In Progress**'. Now, it would track the aggregation of the **Actual Revenue** field post updating the opportunity only if the status of an opportunity is '**In Progress**'.

User Adoption Monitor - User Manual

New Aggregate Configuration

Owner: Brian Walker

General

Name: ---

Entity Configuration: * Opportunity-update

Aggregate On: --Select--

Aggregate Type: * SUM

Status: --Select--
Lost - Canceled
Lost - Out-Sold
Open - In Progress
Open - On Hold
Won - Won

- Now, let's save this aggregate configuration with the below values:
 - **Aggregate On:** Actual Revenue
 - **Aggregate Type:** Sum
 - **Status:** Open – In Progress
- Once saved, this configuration will appear under 'Active User Adoption Aggregate Configurations' as shown below:

Opportunity-update
User Adoption Entity Configuration

General Related

Name: Opportunity-update | Owner: * Brian Walker

Entity Label: * Opportunity | Message: * update

Entity Schema: * opportunity | Period: * Daily

Active User Adoption Aggregate Configurations

Attribute	Aggregate Type	Created On
Actual Revenue	SUM	8/4/2020 5:05 PM

- Next, let's update the below opportunity. This opportunity has the actual revenue of \$10,000.

User Adoption Monitor - User Manual

The screenshot shows the Dynamics 365 interface for an opportunity record titled "Interested in PC Games". The record is in the "Open - In Progress" status. The "Summary" tab is active, displaying various fields. The "Actual Revenue" field is highlighted with a red box and shows a value of "\$10,000.00". Other visible fields include "Budget Amount" (---), "Purchase Process" (---), and "Forecast Category" (Pipeline). The "Timeline" section is empty, and the "Assistant" section shows "No notifications or suggestions".

- Any of the fields from this opportunity record can be modified. Here, '**Budget Amount**' field is updated to \$20,000.

The screenshot shows the same Dynamics 365 interface for the "Interested in PC Games" opportunity record. The "Budget Amount" field is now highlighted with a red box and shows a value of "\$20,000.00". The "Actual Revenue" field is still visible at the bottom of the summary section, showing "\$10,000.00". The rest of the interface remains the same as in the previous screenshot.

- We have set the status as '**Open – In Progress**' in aggregate configuration earlier. Since the status of the opportunity remains '**In Progress**' when the opportunity was updated with '**Budget Amount**', this will be tracked and aggregate value of the field '**Actual Revenue**' will be calculated.
- To check the track entry, navigate to User Adoption Monitor → Entity Configuration → Open '**Opportunity-update**' entity configuration.

User Adoption Monitor - User Manual

The screenshot displays the Dynamics 365 User Adoption Monitor interface. The top navigation bar shows the path: Dynamics 365 > User Adoption Monitor > User Adoption Monitor > Entity Configurations > Opportunity-update. The main content area is titled 'Opportunity-update' and 'User Adoption Entity Configuration'. It features a 'General' tab and a 'Related' tab. Below the tabs, there are two tables: 'Trackings' and 'Aggregate Trackings'. The 'Trackings' table has columns for Name, Total, Target, User, Start Date, End Date, and Created On. The 'Aggregate Trackings' table has the same columns. The 'Aggregate Trackings' table shows a row for 'Brian Walker - Opportunity - update - Actual Revenue' with a Total of 10,000.00, which is highlighted with a red box.

Name	Total	Target	User	Start Date	End Date	Created On
Brian Walker - Opportunity - update	1.00		Brian Walker	8/4/2020	8/4/2020	8/4/2020 5:38 PM

Name	Total	Target	User	Start Date	End Date	Created On
Brian Walker - Opportunity - update - Actual Revenue	10,000.00		Brian Walker	8/4/2020	8/4/2020	8/4/2020 5:38 PM

Note: The way the User Adoption Monitor works in this is, it compares the status of the opportunity against the status that we have set in the aggregate configuration and tracks the aggregation only if these statuses match with each other.

Target Tracking Configuration

By **'Target Tracking'** one can allot and keep track of targets assigned to respective users in Dynamics 365 CRM. The targets can either be assigned against the count of the actions performed or against the aggregate value. Let's take the above example of **'Opportunity-win'** action.

Follow the steps given below for **'Target Configurations'**.

Target based on Aggregation Value

- As per the above example, create entity configuration for **'Opportunity-win'** → Configure 'Aggregate Tracking' → Go to 'Active User Adoption Target Configurations' → Click on 'New Target Configuration'.

User Adoption Monitor - User Manual

New User Adoption Entity Configuration
User Adoption Entity Configuration

General Related

Active User Adoption Aggregate Configurations : Active User Adoption Target Configurations

Attribute Aggregate Type Created On Name

No data available. No data available.

+ New Target Configuration
Refresh
Run Report
Excel Templates
Export User Adoption Targ...
See associated records

- Fill the following fields → Click on Save.
 - a. **Aggregate Configuration:** Select an 'Aggregate Configuration' associated to the same Entity Configuration as that on the Target Configuration form.
 - b. **Target:** Set a value.
 - c. **Interval:** Select either '**Recurring**' or '**Fixed**'.

Save Save & Close + New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report

Opportunity - win - Actual Revenue - SUM
Target Configuration
In Progress Status Reason Thomas Perry Owner

General Related

Name	Opportunity - win - Actual Revenue - SUM		
Entity Configuration *	Opportunity-win	Aggregate Configuration	+ Opportunity - win - Actual Revenue - SUM
Target *	50,000.00	Interval	* Recurring

- Next, add the user for whom the target is set → Click on Save & Close. With this target for 'Actual Revenue' to be achieved has been set for the respective user.

User Adoption Monitor - User Manual

The screenshot shows the 'Opportunity - win - Actual Revenue - SUM' configuration page. The 'Target Configuration' section shows a target of 50,000.00. The 'Users' section is currently empty, displaying 'No data available.' A 'Lookup Records' dialog is open on the right, showing a search for 'Robredo Silva' and a 'No records found' message.

- Now, one can monitor the performance of the users by comparing the target set and the total target achieved by them over a given period of time.

The screenshot shows the 'Opportunity-win' configuration page. The 'Aggregate Trackings' section displays a table with the following data:

Name	Total	Target	User	Start Date	End Date	Created On
Robredo Silva - Opportunity - win - Actual Revenue	20,000.00	50,000.00	Robredo Silva	7/24/2020	7/24/2020	7/24/2020 6:00 ...

Target based on Count

In the same way one can set target based on **count** for users. Taking basis of above example, follow the steps given below:

- Create entity configuration for 'Opportunity-win' → Configure 'Aggregate Tracking' → Go to 'Active User Adoption Target Configurations' → Click on 'New Target Configuration'.

User Adoption Monitor - User Manual

New User Adoption Entity Configuration
User Adoption Entity Configuration

General Related

Active User Adoption Aggregate Configurations : Active User Adoption Target Configurations

Attribute Aggregate Type Created On Name

No data available. No data available

+ New Target Configuration
Refresh
Run Report
Excel Templates
Export User Adoption Targ...
See associated records

- Fill the following fields → Click on Save.
 - **Aggregate Configuration:** Keep this field empty.
 - **Target:** Set a value.
 - **Interval:** Select either '**Recurring**' or '**Fixed**'.

Opportunity-win - Count
Target Configuration

In Progress Status Reason Thomas Perry Owner

General Related

Name Opportunity-win - Count

Entity Configuration * Opportunity-win Aggregate Configuration ---

Target * 10.00 Interval * Recurring

Users

Add Existing User Refresh

Full Name Site Business Unit Title Position Main Phone

- Next, add the user for whom the target is set → Click on Save & Close. With this the number of targets to be achieved for a given period has been set for the respective user.
- Now, one can monitor and compare the target set and the total target achieved by users for a given period of time.

Opportunity-win
User Adoption Entity Configuration

General Related

Attribute	Aggregate Type	Created On	Name	Target	Interval	Start Date
Actual Revenue	SUM	7/24/2020 5:5...	Opportunity-win - Count	10.00	Recurring	---
			Opportunity - win - Actual Revenue - SUM	50,000.00	Recurring	---

Trackings

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 ...

Target defined for Fixed Interval

In the above two scenarios, we defined Targets with the Interval set as 'Recurring'. However, we do have another option i.e. to define the Target for a fixed period of time by setting the Interval as Fixed.

On setting the interval of the Target Configuration as fixed, two datetime fields i.e. the **Start Date** and **End Date** shows up using which one can define the period for which they want to set the target against tracking.

Note: *The Start Date and End Date must be within the period of the associated Entity Configuration. For example, if the Period of the associated Entity Configuration is.*

- **Daily:** *The Start and End date must be the same date, i.e. 8th August 2020 – 8th August 2020.*
- **Weekly:** *The Start and End date must be within the same week i.e. Sunday to Saturday.*
- **Monthly:** *The Start and End date must be within the same month, i.e. 1st August 2020 – 31st August 2020.*

Similar steps needed to be followed for the creation of the Target configuration for fixed interval:

- Create the respective entity configuration record if not already created. Then open that record and from the sub-grid for Target Configuration create a new Target Configuration.

Opportunity-win
User Adoption Entity Configuration

General Related

Entity Schema * opportunity Period * Monthly

Active User Adoption Aggregate Configurations ▾

Attribute ▾	Aggregate Type ▾	Created On ↑ ▾
Actual Revenue	SUM	7/24/2020 5:5...

Active User Adoption Target Configurations ▾

Name ▾
Opportunity - win - Actual Revenue - SUM

- + New Target Configuration
- Refresh
- Run Report >
- Excel Templates >
- Export User Adoption Targ... >
- See associated records

- Fill the following fields → Click on Save.
 - **Aggregate Configuration:** You may or may not select the aggregate configuration associated to the entity configuration.
 - **Target:** Set a value
 - **Interval:** Select **'Fixed'**. On selecting the Interval as fixed, the below two Datetime fields show up to define the period.
 - **Start Date:** Set the date from when the tracking will be captured against this defined target for respective users.

Note: Once the start date is entered, the status reason of the target configuration record gets updated to **'In Progress'**. And only the **In Progress** target configurations are considered for target tracking.

- **End Date:** Set the date till when the target tracking shall take place.

Note: On the date next to the end date the status reason of the target configuration shall get updated to **Complete** and once the status reason gets updated to complete, no further target tracking shall happen for this specific target configuration.

User Adoption Monitor - User Manual

Opportunity - win - Actual Revenue - SUM
Target Configuration

In Progress
Status Reason | Thomas Perry
Owner

General Related

Name	Opportunity - win - Actual Revenue - SUM		
Entity Configuration *	Opportunity-win	Aggregate Configuration	Opportunity - win - Actual Revenue - SUM
Target *	5,000.00	Interval *	Fixed
Start Date *	7/24/2020	End Date *	7/29/2020

- Next, add the user for whom the target is set → Click on Save & Close.
- With this, one can monitor and compare the target set and the total target achieved by users for a given fixed period of time.

Opportunity-win
User Adoption Entity Configuration

General Related

Active User Adoption Aggregate Configurations			Active User Adoption Target Configurations					
Attribute	Aggregate Type	Created On	Target	Interval	Start Date	End Date	Create...	
Actual Revenue	SUM	7/24/2020 5:5...	ual Revenue - SUM	5,000.00	Fixed	7/24/2020	7/29/2020	7/24/2020...
			ual Revenue - SUM	20,000.00	Recurring	---	---	7/24/2020...

Opportunity-win
User Adoption Entity Configuration

General Related

Robredo Silva - Opportunity - win	1.00	---	Robredo Silva	7/1/2020	7/31/2020	7/24/2020 6:45 ...
-----------------------------------	------	-----	---------------	----------	-----------	--------------------

Aggregate Trackings Refresh Run Report

Name	Total	Target	User	Start Date	End Date	Created On
Robredo Silva - Opportunity - win - Actual Revenu	600.00	20,000.00	Robredo Silva	7/1/2020	7/31/2020	7/24/2020 6:45 ...
Robredo Silva - Opportunity - win - Actual Revenu	600.00	5,000.00	Robredo Silva	7/24/2020	7/29/2020	7/24/2020 6:45 ...

Data Completeness Configuration

By **'Data Completeness'** one can ensure that the necessary data has been captured for an entity record in Dynamics 365 CRM as per the business requirement. Here, one shall choose the field(s) that are essential for an organization to be captured and ensure that data is within CRM. If it is not captured, then the status of that record will be shown as **'Incomplete'**.

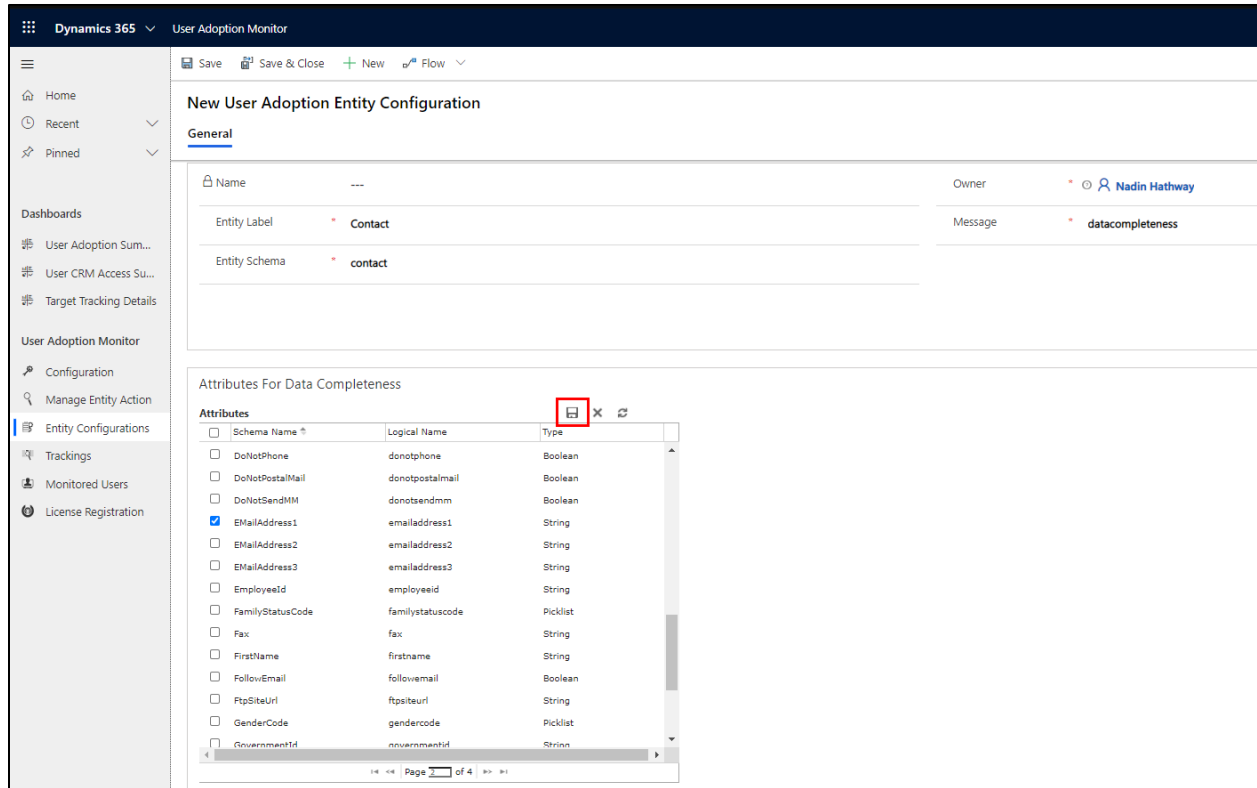
Follow the steps given below to configure **'Data Completeness'**:

- Navigate to Entity Configuration → Click on New.

The screenshot shows the 'New User Adoption Entity Configuration' form in the Dynamics 365 User Adoption Monitor. The form is in the 'General' tab and contains a table with the following fields:

Name	---	Owner	* Nadin Hathway
Entity Label	* ---	Message	* ---
Entity Schema	* ---	Period	* ---

- Fill the following fields.
 - **Entity Label:** Set the display name of the entity for which you want to configure datacompleteness. For example: Contact.
 - **Entity Schema:** Set the logical name of the entity for which you want to configure datacompleteness. For example: contact.
 - **Message:** datacompleteness (Once this field is set the 'Period' field will hide and the Attribute grid shows up).
 - Select the attributes needed for completeness of data from the Attributes grid.
- Click on Save button over the Attribute grid as shown in the screenshot below:



- Once this entity configuration is saved, an Optionset type of field with the below details gets created for the entity for which datacompleteness has been configured.

Display Name: Completeness

Logical Name: ikl_completeness

Data Type: Optionset

Options: Complete & Incomplete

- Now every time the record of the entity (for which datacompleteness has been configured) gets created or updated, the process shall check the existence of value in the fields which have been selected for completeness. If the value is present in all those fields then the value of the custom option set field i.e. the **ikl_completeness** gets set as **Complete** or else it will be set as **Incomplete**.

Note: Whether to add this custom field on the form or view is totally up to the administrators of the respective organizations, and will have to be done manually. Also, it is imperative to remove this field from the forms or views before deleting the datacompleteness entity configuration.

- The below screenshots give an idea on the Completeness fields when placed on the header of the form.

User Adoption Monitor - User Manual

The screenshot shows a CRM contact record for Patrick Jane. The contact information is partially filled: First Name (Patrick), Last Name (Jane), and Email (patrick@gmail.com). The Business Phone field is empty. The status is 'Incomplete Completeness'. A timeline entry shows an auto-post on Patrick Jane created by Thomas Perry on 7/26/2020 at 11:19 AM. The Assistant section shows 'No notifications or suggestions' and the Opportunities section shows 'No data available'.

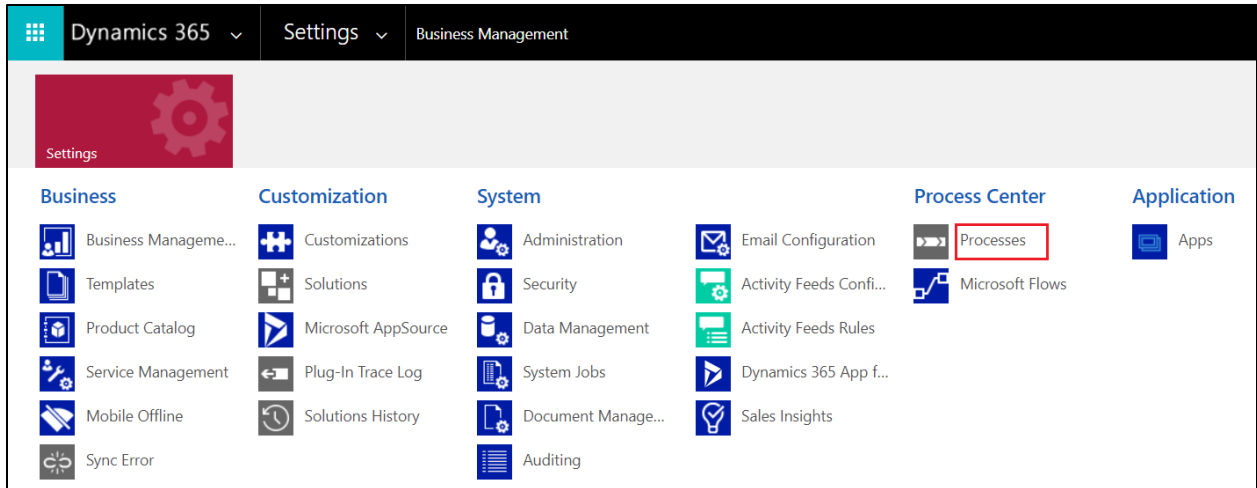
The screenshot shows the same CRM contact record for Patrick Jane, but now the status is 'Complete Completeness'. The Business Phone field is now filled with the number 544545445. The Assistant and Opportunities sections are empty.

Data Completeness for History Records

The records created after the configuration of Data Completeness entity can be tracked and monitored to ensure that all the defined fields in the records are duly filled. But this is not applicable for the already existing records in CRM. In order to check the completeness of the history records one has to create a separate on-demand workflow and run the same for these history records.

Follow the steps given below to create workflow to monitor the completeness of History records:

- Navigate to Advanced Settings → Settings → Processes.



- Select New → Set the following fields → Click on OK.
 - **Category:** Workflow.
 - **Entity:** Select the entity for which the datacompleteness has been configured and the completeness of the history records that needs to be monitored.

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Category: * Entity: *

Run this workflow in the background (recommended)

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Type: New blank process
 New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owne
<div style="background-color: #f0f0f0; border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Template Name ↑ Primary Entity Owne </div> <div style="height: 80px; border: 1px solid #ccc; margin-bottom: 5px;"></div> </div>		

User Adoption Monitor - User Manual

- Select **'As an on demand process'** → Select scope as **Organization** → Click on **'Add Step'** to call User Adoption Monitor assembly.

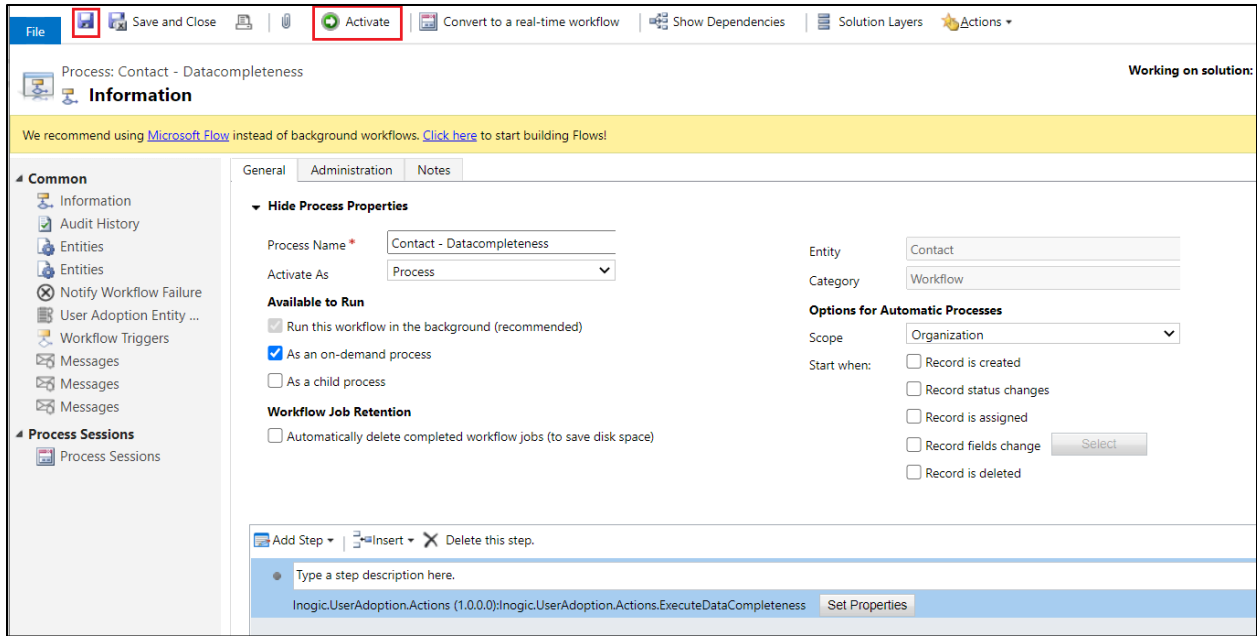
The screenshot shows the configuration interface for a process. The 'Administration' tab is active. Under 'Hide Process Properties', the 'Process Name' is 'Contact - Datacompleteness' and 'Activate As' is 'Process'. In the 'Available to Run' section, 'Run this workflow in the background (recommended)' is checked, and 'As an on-demand process' is selected. The 'Workflow Job Retention' section has 'Automatically delete completed workflow jobs (to save disk space)' unchecked. On the right, 'Entity' is 'Contact' and 'Category' is 'Workflow'. Under 'Options for Automatic Processes', 'Scope' is 'Organization'. The 'Start when' section has 'Record is created', 'Record status changes', 'Record is assigned', and 'Record is deleted' unchecked, while 'Record fields change' is checked. A 'Select' button is next to it. At the bottom, the 'Add Step' button is highlighted with a red box.

- Select **'Inogic.User.Adoption.Actions (1.0.0.0)'** → Select **'Inogic.User.Adoption.Actions.Execute.DataCompleteness'**.

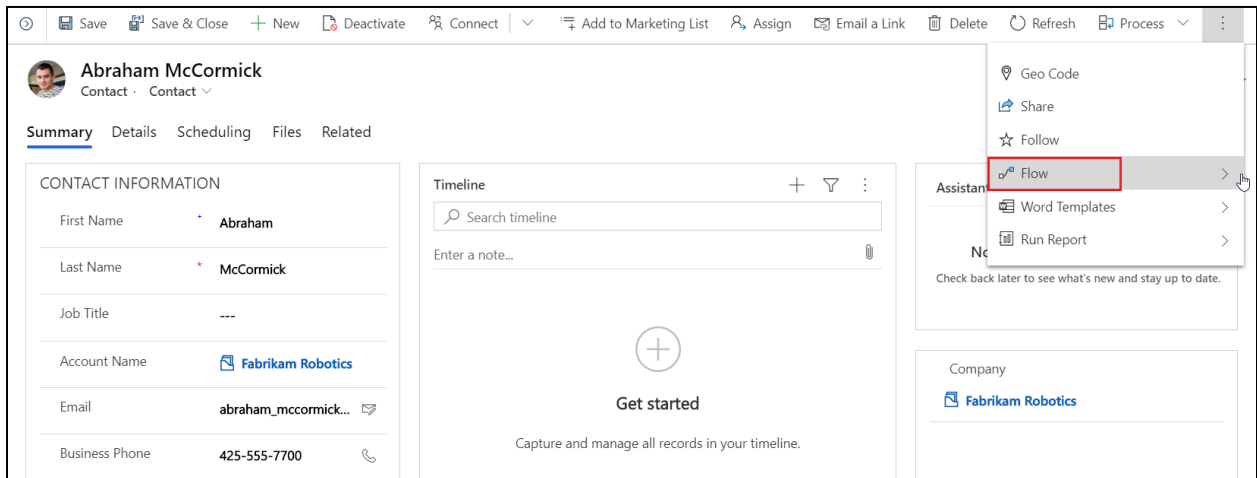
This screenshot shows the same configuration interface as above, but with the 'Add Step' dropdown menu open. The menu lists various assemblies, with 'Inogic.UserAdoption.Actions (1.0.0.0)' highlighted in red. A sub-menu is open for this assembly, and 'Inogic.UserAdoption.Actions.ExecuteDataCompleteness' is highlighted in red. The 'Select' button next to the 'Record fields change' option is also visible.

- Click on Save and then activate the process.

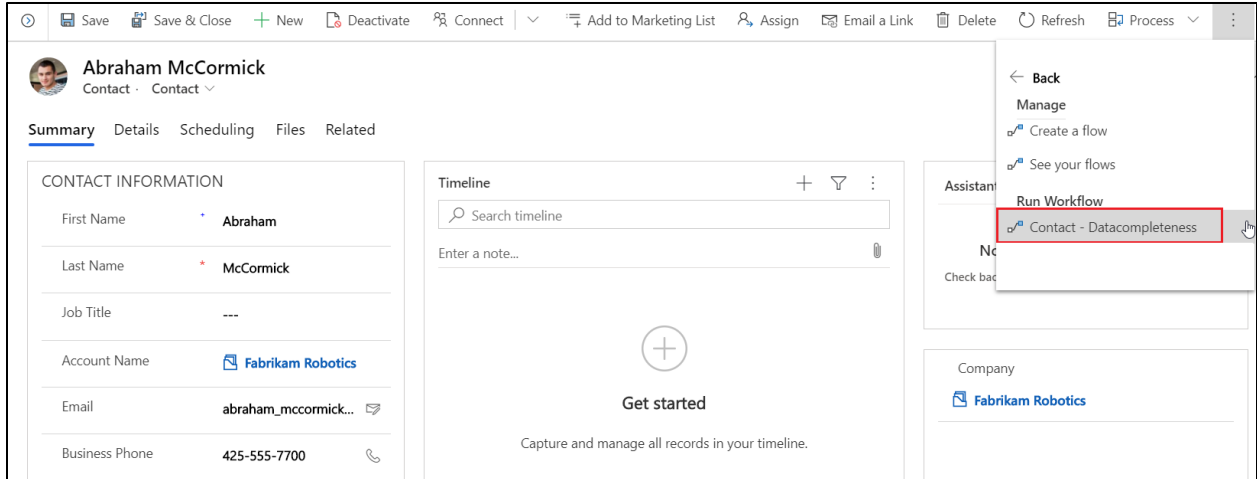
User Adoption Monitor - User Manual



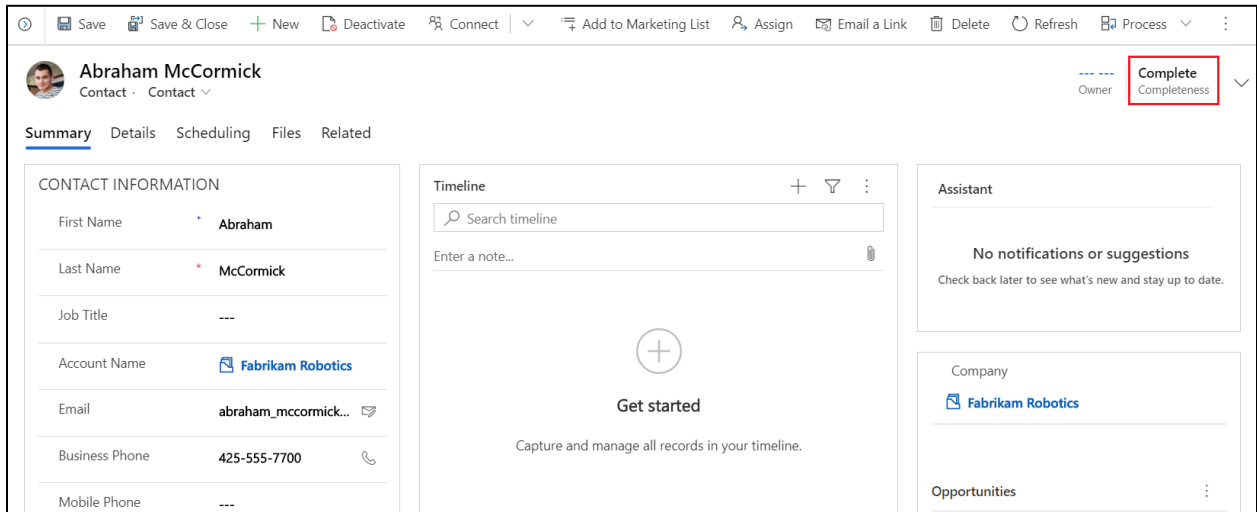
- Navigate to any of the records of the configured entity → Go to Flow → Click on newly created workflow.



User Adoption Monitor - User Manual



- Once the workflow has run the value of the Completeness field shall get set.



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 Export to Excel

Active Tracking View Search this view

Name	Total	Target	User	Start Date	End Date	Created On
Katie Lewis - Account - create	1.00	---	Katie Lewis	8/4/2020	8/4/2020	8/4/2020 10:09 PM

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 Export to Excel						
Active Tracking View ▾						<input type="text" value="Search this view"/>
<input checked="" type="checkbox"/> Name ▾	Total ▾	Target ▾	User ▾	Start Date ▾	End Date ▾	Created On ▾
Katie Lewis - Account - update	1.00		Katie Lewis	8/2/2020	8/8/2020	8/4/2020 10:17 PM

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

Name	Account-ikl_open	Owner	Sam Inogic
Entity Label	Account	Message	ikl_open
Entity Schema	account	Period	Daily

Active User Adoption Aggregate Configurations

Attribute	Aggregate Type	Created On
No data available.		

Active User Adoption Target Configurations

Name	Target	Interval	Start Date	End Date
No data available.				

Trackings

Name	Total	Target	User	Start Date	End Date	Created On
Katie Lewis - Account - ikl_open	1.00	---	Katie Lewis	8/4/2020	8/4/2020	8/4/2020 10:20 PM

- 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**

Form Properties
Modify this form's properties.

Lookup Record
Enter your search criteria.

Look for: Web Resource

Look in: WebResource Lookup View

Search: ikl_/UserAdoption/scripts/jq

Name	Display Name...	Language
<input checked="" type="checkbox"/> ikl_/UserAdoption/scripts/jquery.js	ikl_/UserAdo...	

1 - 1 of 1 (1 selected) Page 1

New Add Cancel Remove Value

OK Cancel

➤ **ikl_/UserAdoption/UserAdoption.XRMLib.js**

Form Properties
Modify this form's properties.

Lookup Record
Enter your search criteria.

Look for: Web Resource
Look in: WebResource Lookup View
Search: ikl_/UserAdoption/UserAdop

Name ↑	Display Name...	Language ↻
<input checked="" type="checkbox"/> ikl_/UserAdoption/UserAdoption.XRMLib.js	ikl_/UserAdo...	

1 - 1 of 1 (1 selected) Page 1

New Add Cancel Remove Value

OK Cancel

- **ikl_/UserAdoption/scripts/UserAdoption.ExecuteReadAction.js**

Form Properties

Modify this form's properties.

Lookup Record

Enter your search criteria.

Look for:

Look in:

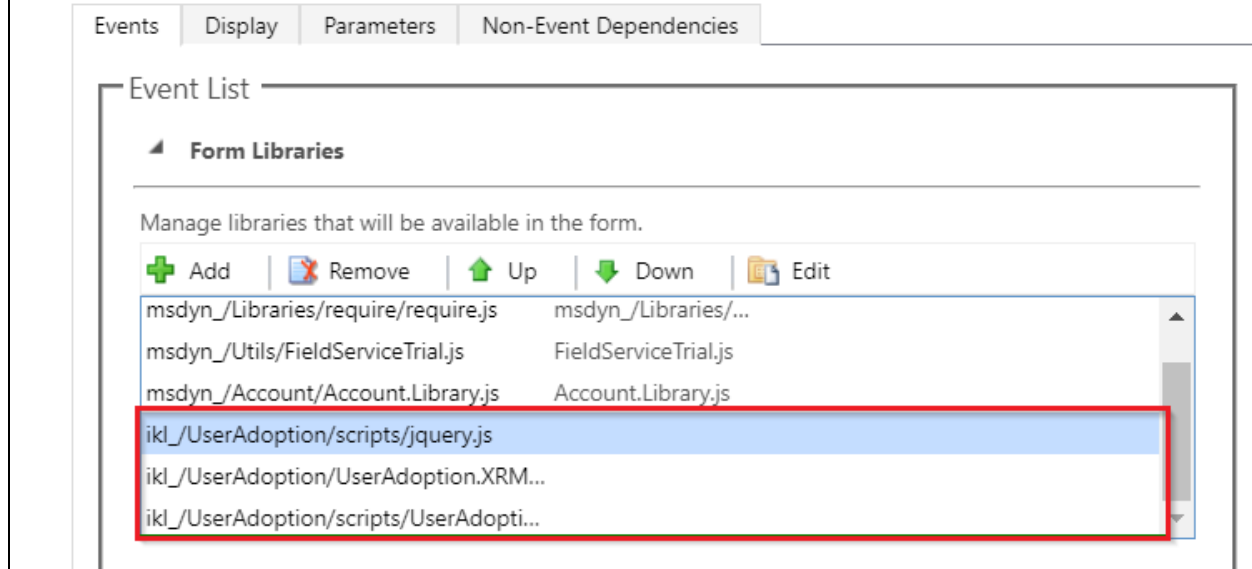
Search:

Name	Display
<input checked="" type="checkbox"/> ikl_/UserAdoption/scripts/UserAdoption.ExecuteReadAction.js	ikl_/UserAdc

1 - 1 of 1 (1 selected) Page 1

Form Properties

Modify this form's properties.



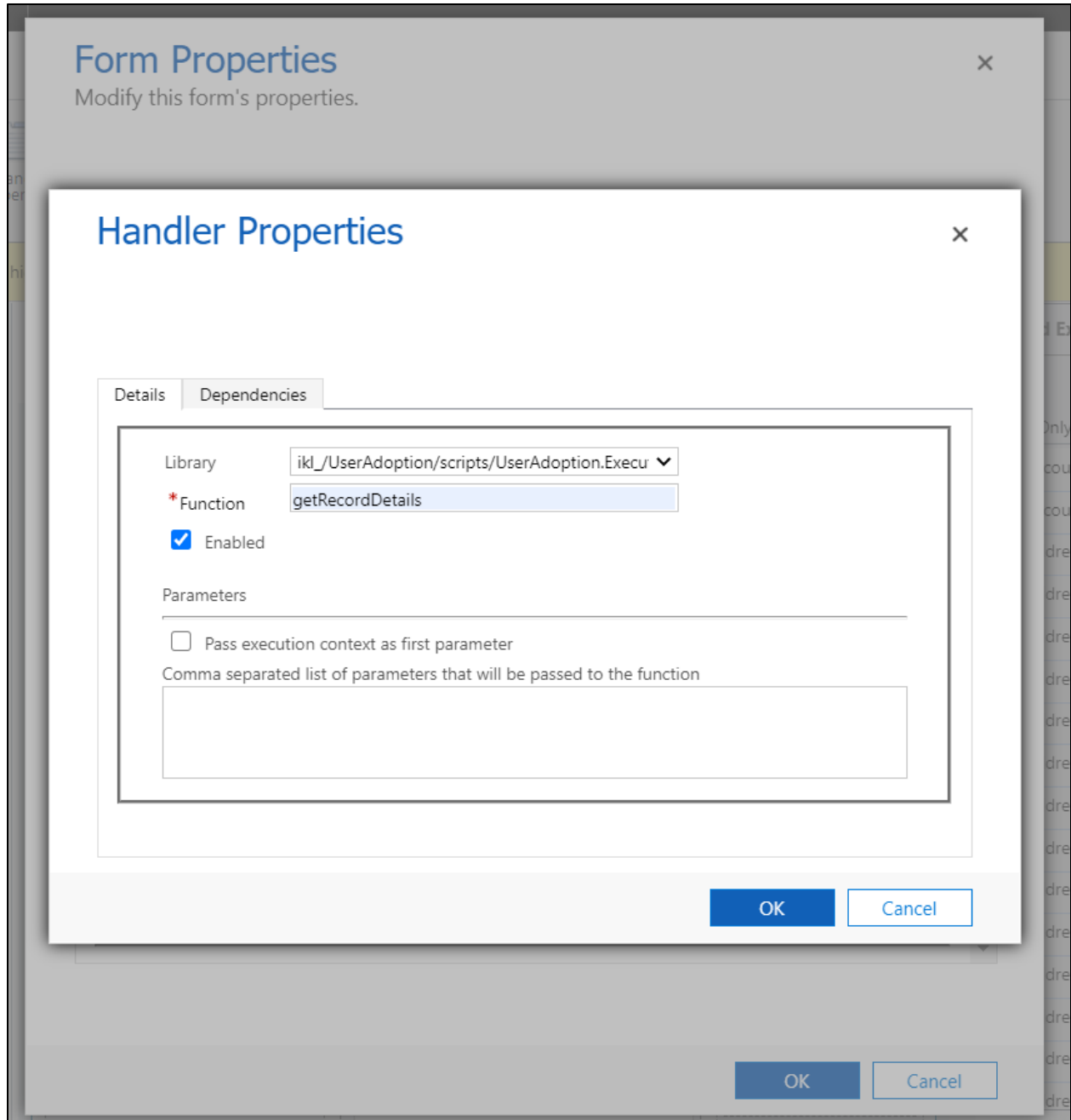
The screenshot shows the 'Form Properties' interface with the 'Event List' tab selected. Under the 'Form Libraries' section, there is a list of libraries. The library 'ikl_/UserAdoption/scripts/jquery.js' is highlighted with a red box. The list also includes 'msdyn_/Libraries/require/require.js', 'msdyn_/Utils/FieldServiceTrial.js', 'msdyn_/Account/Account.Library.js', 'ikl_/UserAdoption/UserAdoption.XRM...', and 'ikl_/UserAdoption/scripts/UserAdopti...'. Above the list are buttons for 'Add', 'Remove', 'Up', 'Down', and 'Edit'.

- Then finally call the *'getRecordDetails'* function on the Form OnLoad event as shown in the [below](#) screenshot from the Java Script Library *ikl_/UserAdoption/scripts/UserAdoption.ExecuteReadAction.js* (which has already been included in the form) onload of the form and then save and publish the customizations.

The image shows a 'Form Properties' dialog box with a 'Handler Properties' sub-dialog. The 'Handler Properties' dialog has two tabs: 'Details' and 'Dependencies'. The 'Details' tab is active. It contains the following fields:

- Library:** A dropdown menu showing 'ikl_UserAdoption/scripts/UserAdoption.Execu'.
- *Function:** A list of functions with a search box. The selected function is 'ikl_UserAdoption/scripts/UserAdoption.ExecuteReadAction.js'. Other functions in the list include 'msdyn_Libraries/require/require.js', 'msdyn_Utils/FieldServiceTrial.js', 'msdyn_Account/Account.Library.js', and 'ikl_UserAdoption/scripts/jquery.js'.
- Enabled:** A checked checkbox.
- Parameters:** A text input field containing 'ikl_UserAdoption/UserAdoption.XRMLib.js' and 'ikl_UserAdoption/scripts/UserAdoption.ExecuteReadAction.js'.
- Pass execution context as first parameter:** An unchecked checkbox.
- Comma separated list of parameters that will be passed to the function:** An empty text input field.

At the bottom of the 'Handler Properties' dialog are 'OK' and 'Cancel' buttons. The background shows a 'Form Explorer' with a list of fields including 'All Fields', 'Only show unused fields', 'count Number', 'count Rating', 'Address 1: Address Type', 'Address 1: City', 'Address 1: County', 'Address 1: Fax', 'Address 1: Name', 'Address 1: Post Office Box', 'Address 1: Primary Contact', 'Address 1: State/Province', 'Address 1: Street 1', 'Address 1: Street 2', 'Address 1: Street 3', 'Address 1: Telephone 2', and 'Address 1: Telephone 3'.



Events Display Parameters Non-Event Dependencies

Manage instances that will be available in the form:

+ Add ✖ Remove ↑ Up ↓ Down 📄 Edit

msdyn_/Libraries/require/require.js	msdyn_/Libraries/...
msdyn_/Utils/FieldServiceTrial.js	FieldServiceTrial.js
msdyn_/Account/Account.Library.js	Account.Library.js
ikl_/UserAdoption/scripts/jquery.js	
ikl_/UserAdoption/UserAdoption.XRM...	
ikl_/UserAdoption/scripts/UserAdopti...	

▲ **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
Sales/ClientCommon/Sales_ClientCom...	Sales.DocumentsTabController.shouldS...	True
msdyn_/Account/Account.Library.js	FS.Account.Library.Load	True
msdyn_/Utils/FieldServiceTrial.js	FieldServiceTrial.Library.Load	True
ikl_/UserAdoption/scripts/UserAdoptio...	getRecordDetails	True

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;

Katie Lewis - Account - update --- Aggregate Configuration --- Target Configuration SYSTEM Owner

User Adoption Tracking

General Related

Tracking Summary

Entity Label: Account	Message: update
User: ● Katie Lewis	Total: 1.00
Target: ---	
Start Date: 8/2/2020	End Date: 8/8/2020

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

- **Entity Label:** 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.
- **Total:** The total 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.

Katie Lewis - Account - update --- Aggregate Configuration --- Target Configuration SYSTEM Owner

User Adoption Tracking

General Related

Tracking Summary

Entity Label: Account	Message: update
User: ● Katie Lewis	Total: 1.00
Target: ---	
Start Date: 8/2/2020	End Date: 8/8/2020

Tracking Details

Refresh Run Report Excel Templates




Name 1	Record URL	Access Date Time (for Login only)	Status Reason	Created On 1
Track Details: Katie Lewis - Account - update - 8/4/2020 https://mrogs1.crm.dynamics.com/main.aspx?etn=account&paget...			Active	8/4/2020 10:17 PM

A tracking detail record provides you with the following information;

Track Details: Katie Lewis - Account - update - 8/4/2020 10:17:26 PM

User Adoption Tracking Details

General Related

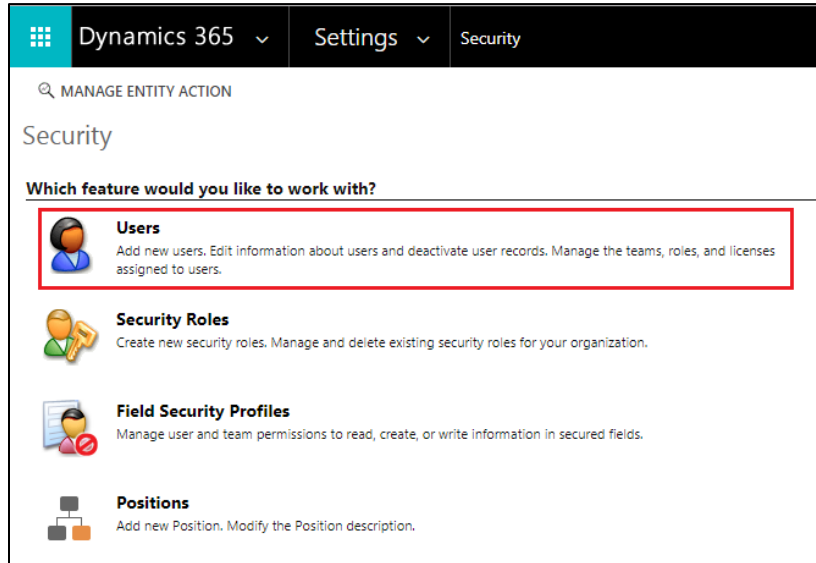
Name	* Track Details: Katie Lewis - Account - update - 8/4/2020 10:17:26 PM
Owner	*  SYSTEM
Record Guid	ccf21bfe-f2d6-ea11-a813-000d3a58d840
Record URL	https://mrogs1.crm.dynamics.com//main.aspx?etn=account&pagetype=... 
Tracking Id	 Katie Lewis - Account - update

- **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 that is being tracked.

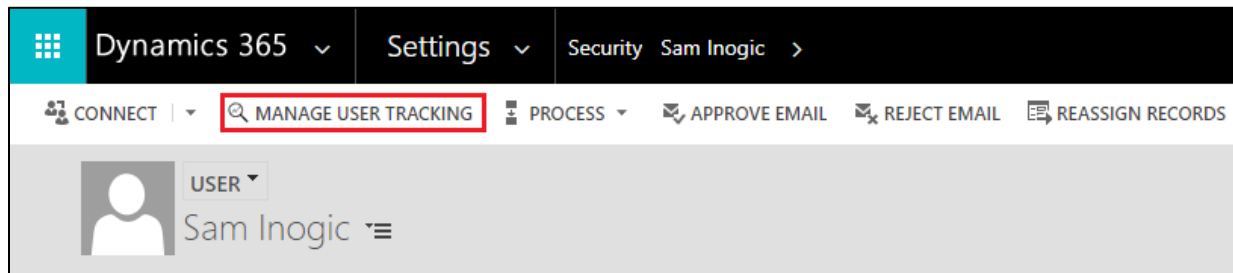
Control User Level Tracking

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

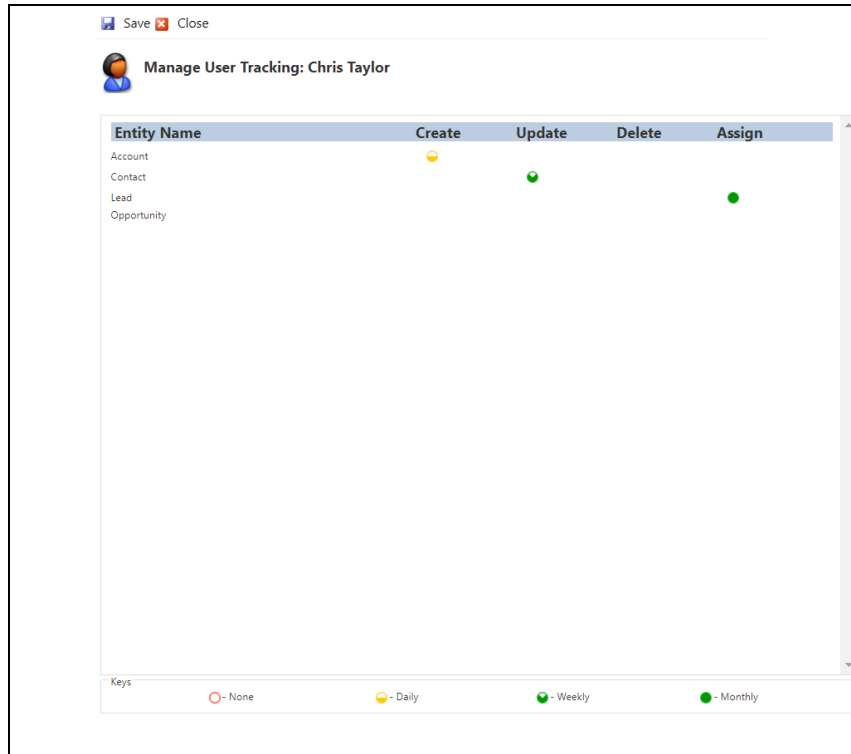
- Navigate to *Advanced Settings* > *Settings* > *Security* > *Users*.



- 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.

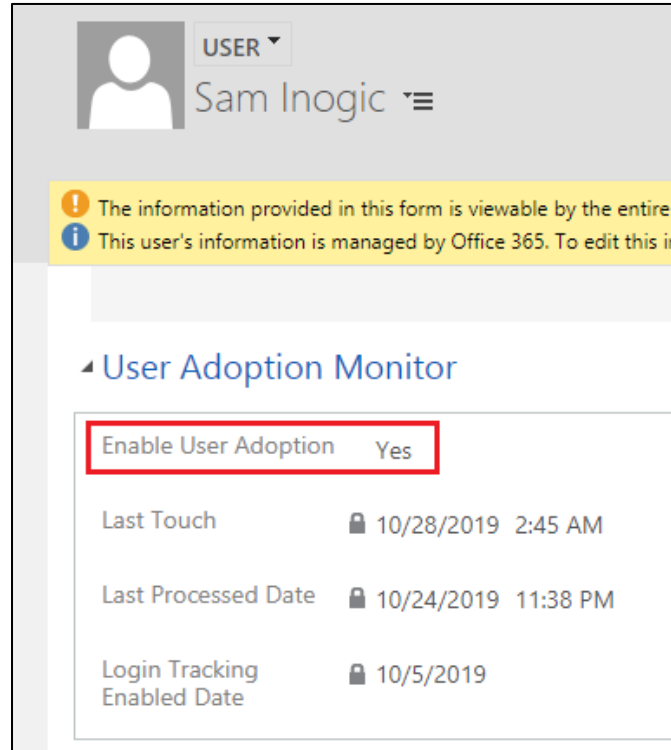
Note: For opportunity, we have enabled Win message/action, and since it is not available as a message/action in the UI, Opportunity will be listed here, but no options against it will be available.

- 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 or you would need to customize the user's tracking for the newly created action as well.

Control Tracking for a User Globally

On the System Users form, we have a section called User Adoption Monitor where you can define whether to enable or disable User Adoption Monitor tracking for the selected user.

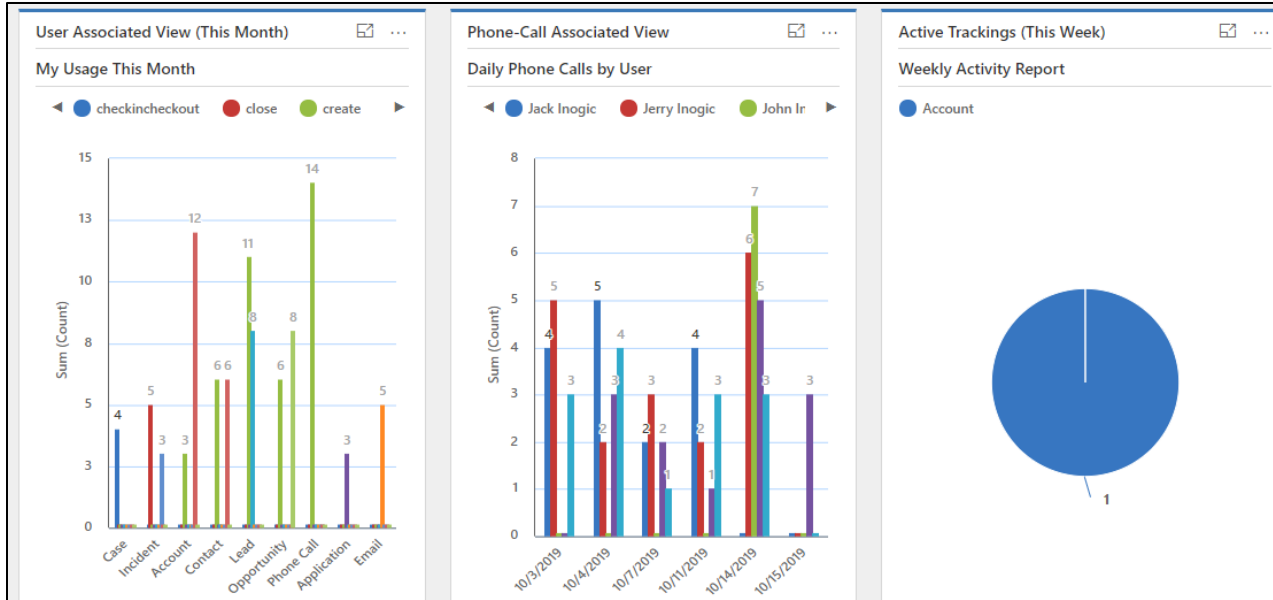


Set the *Enable User Adoption* to *No* to not track any actions of this user.

Last Touch would show the last date of 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 in 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.

Contact Us

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