



# User Adoption Monitor

# inogic

## User Manual

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## Introduction

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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 and 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.

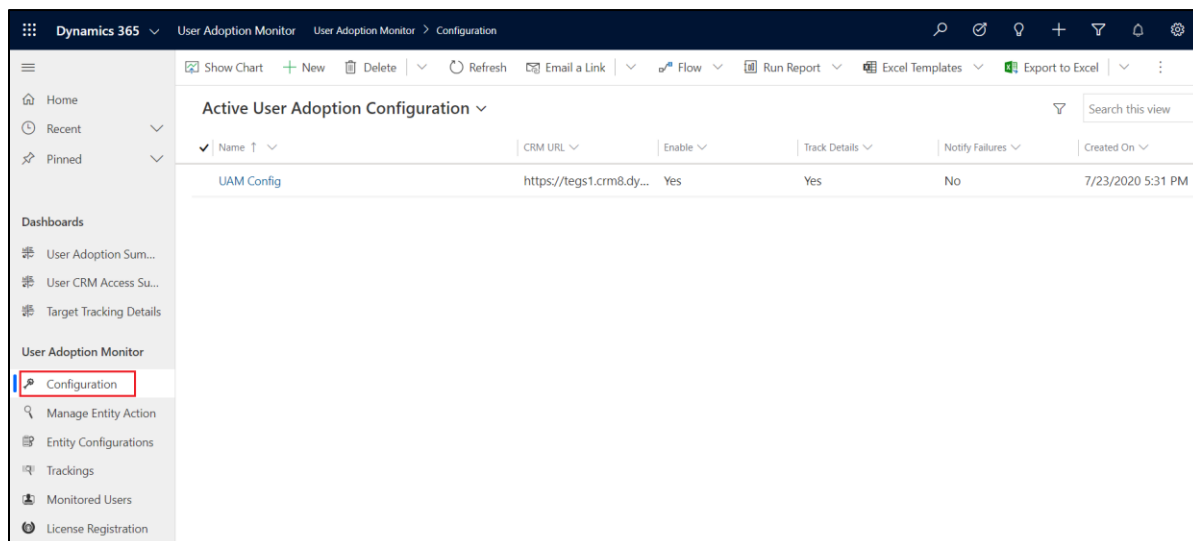
## Getting Started

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. <a href="#">Know More.</a>
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 the 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	○	○	○	○
Application/User	○	○	○	○
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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**Active User Adoption Entity Configuration**

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

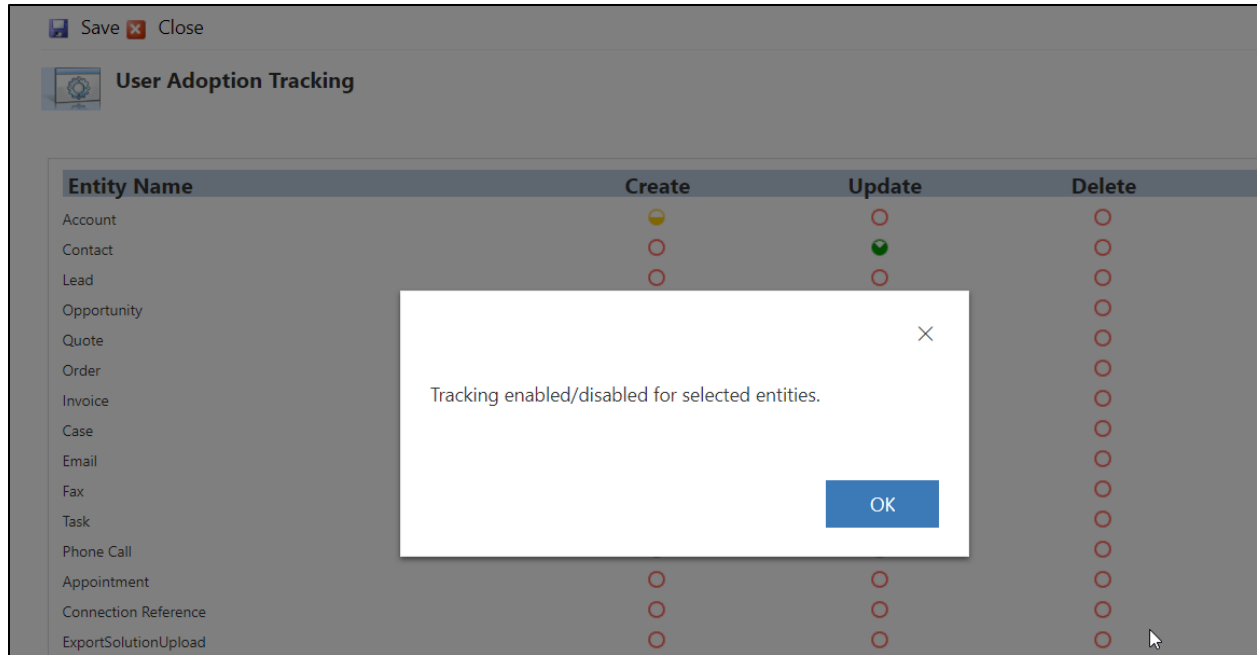
- Here we have enabled tracking for the following entities:
  - For Account: Set 'Create' to period 'Daily'
  - For Contact: Set 'Update' to 'Weekly'
  - For Lead: Set 'Assign' to 'Monthly'

**User Adoption Tracking**

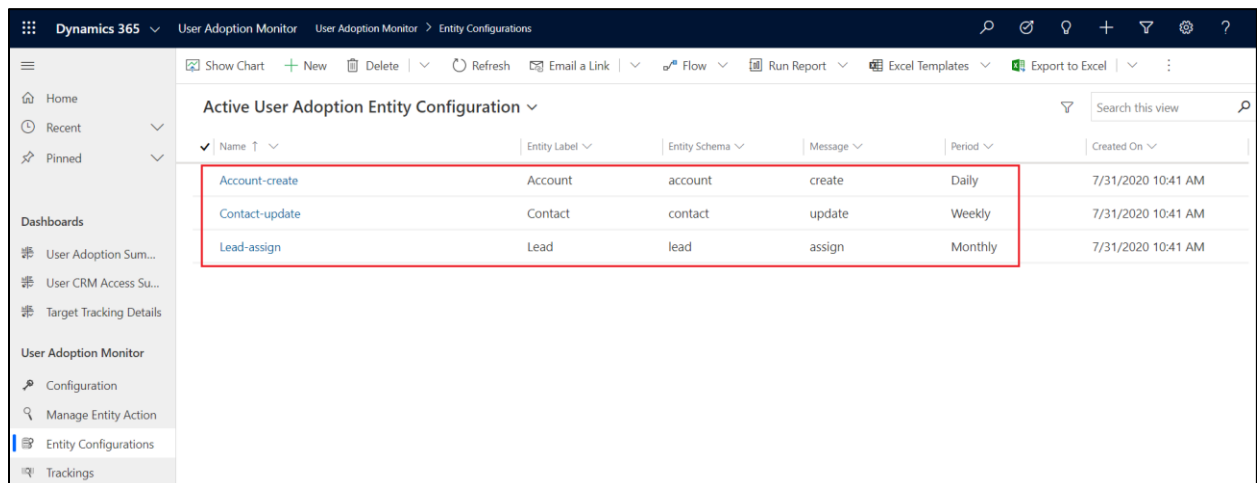
Entity Name	Create	Update	Delete	Assign
Account	○	○	○	○
Contact	○	●	○	○
Lead	○	○	○	●

- 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.



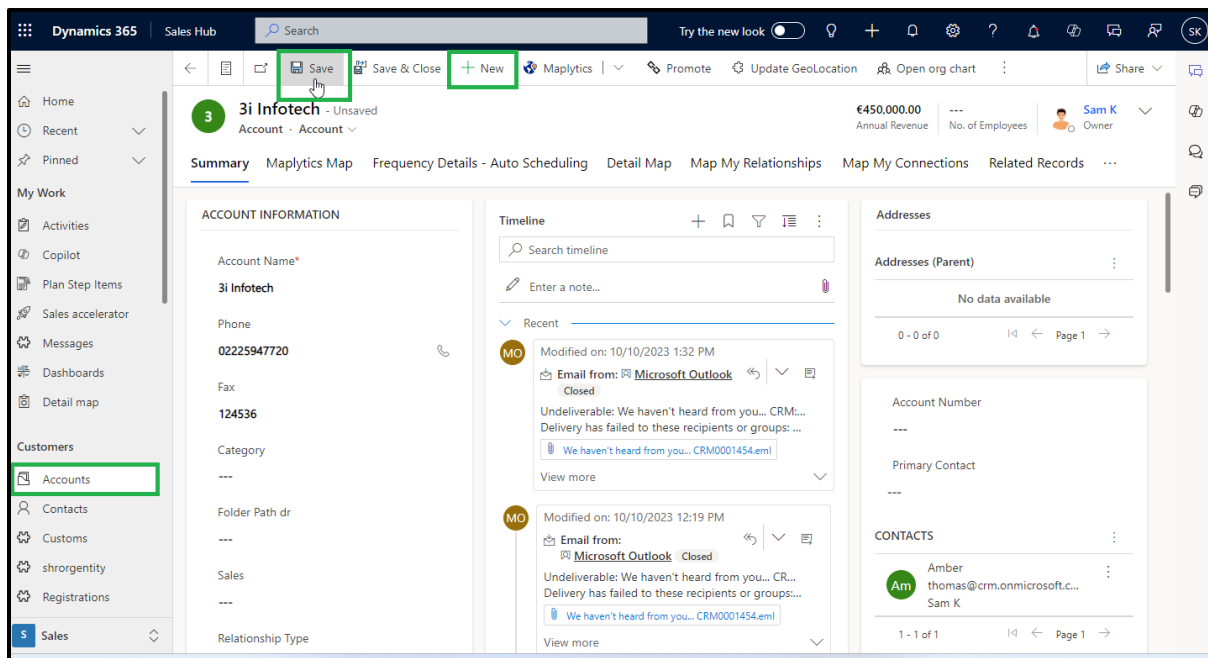
- With these entity configurations, the respective entity actions will be tracked as shown below:

### For Account – Create (Daily)

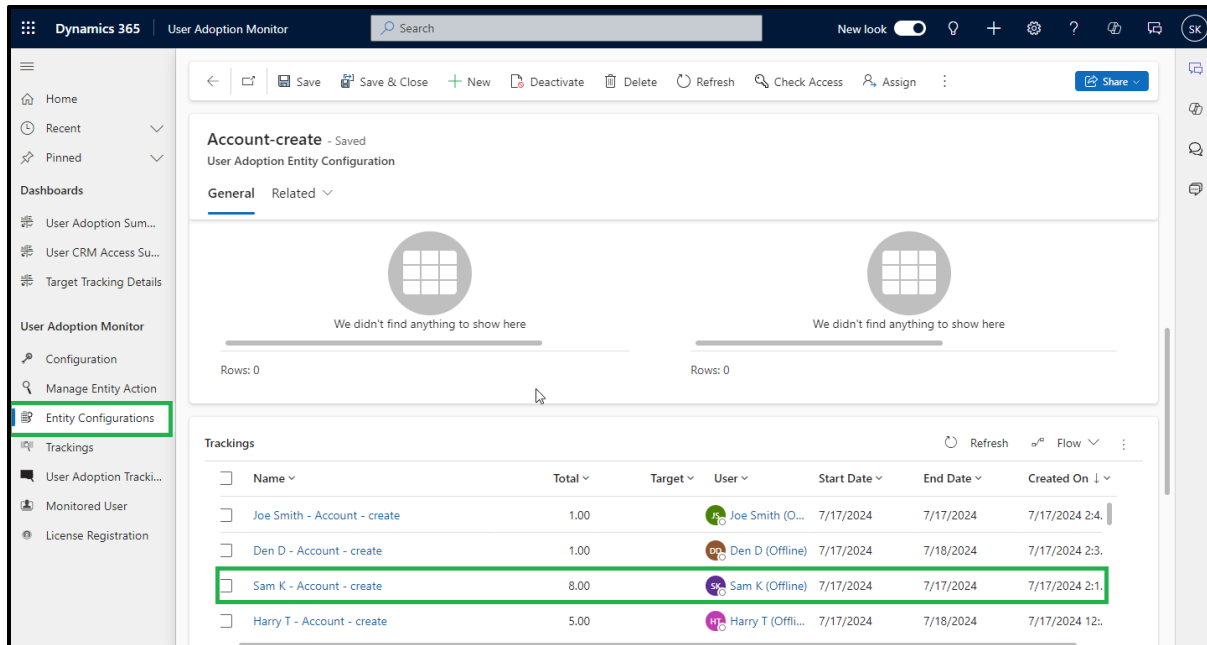
For example, Mark, the sales manager at Cortana Company, wants to track daily actions related to the Account Entity.

Sam, a CRM user, wants to create a new account.

To do this, he will click the **"New"** button, enter the account details as required by the form (ensuring all mandatory fields are completed), and then click the **"Save"** button.



Once the user (Sam) creates a new Account, the tracking details will be shown under the Entity Configuration tab of the User Adoption Monitor as follows.



In this way, all accounts created will be monitored easily.

**Note:** The same steps apply to Delete and Assign actions.

## For Fax – Update (Weekly)

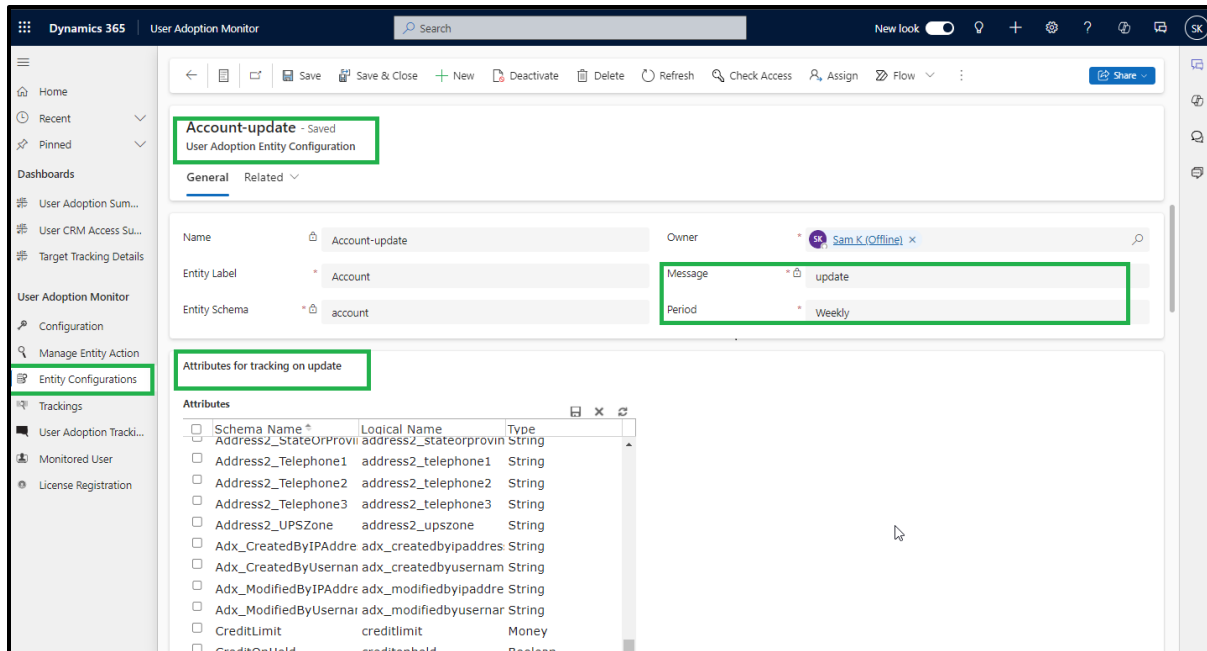
Let's say Mark also wants to track "**Weekly Updates**" under the Account Entity.

Mark will click on "**Account-update**" listed in "**Entity Configuration**" under "**Active User Adoption Entity Configuration**".

The following window will appear on the screen.

Mark will select the "**Weekly**" option for the **Period** field to track account updates every week.

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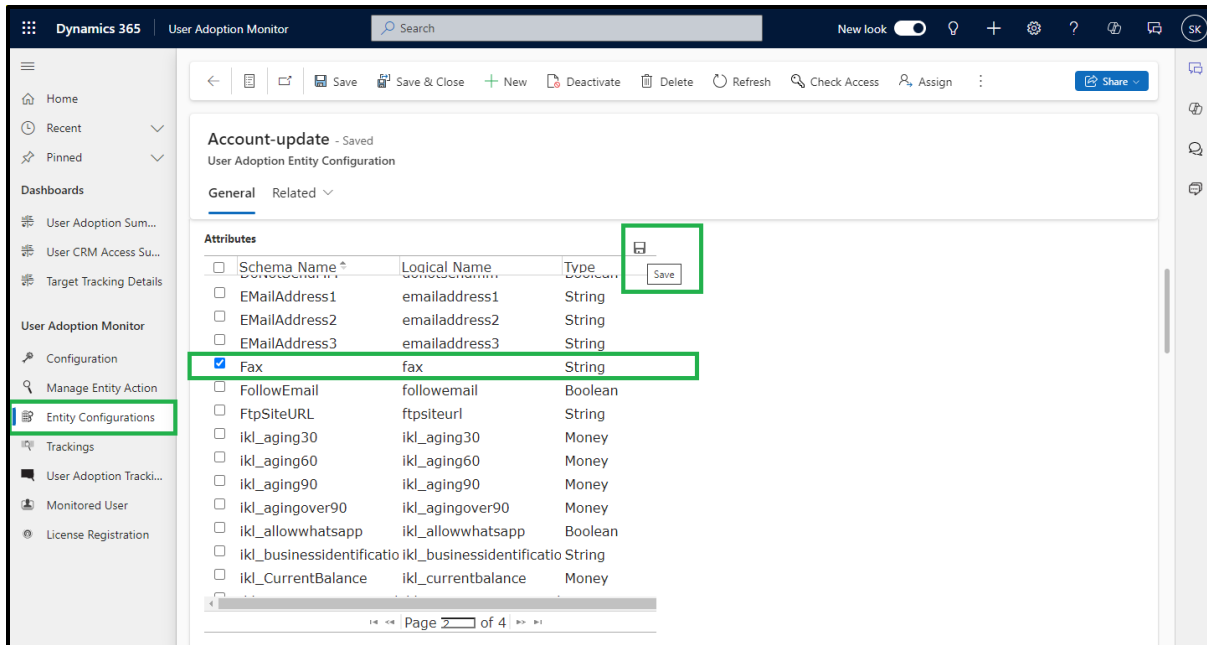


Additionally, Mark can choose specific attributes from the grid to track. If he selects certain attributes and saves the settings, only those attributes will be monitored.

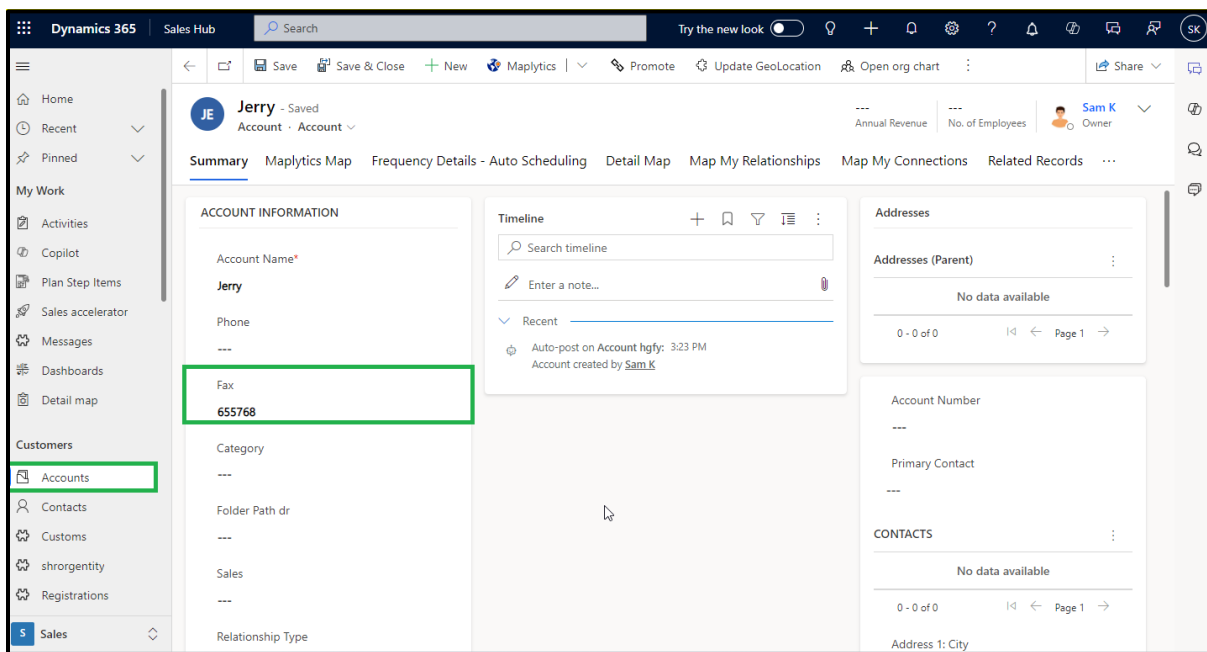
**Note:** If user doesn't select at least one attribute, updates will be tracked for all attributes in the schema.

For this instance, Mark is tracking updates for the “Fax” attribute.

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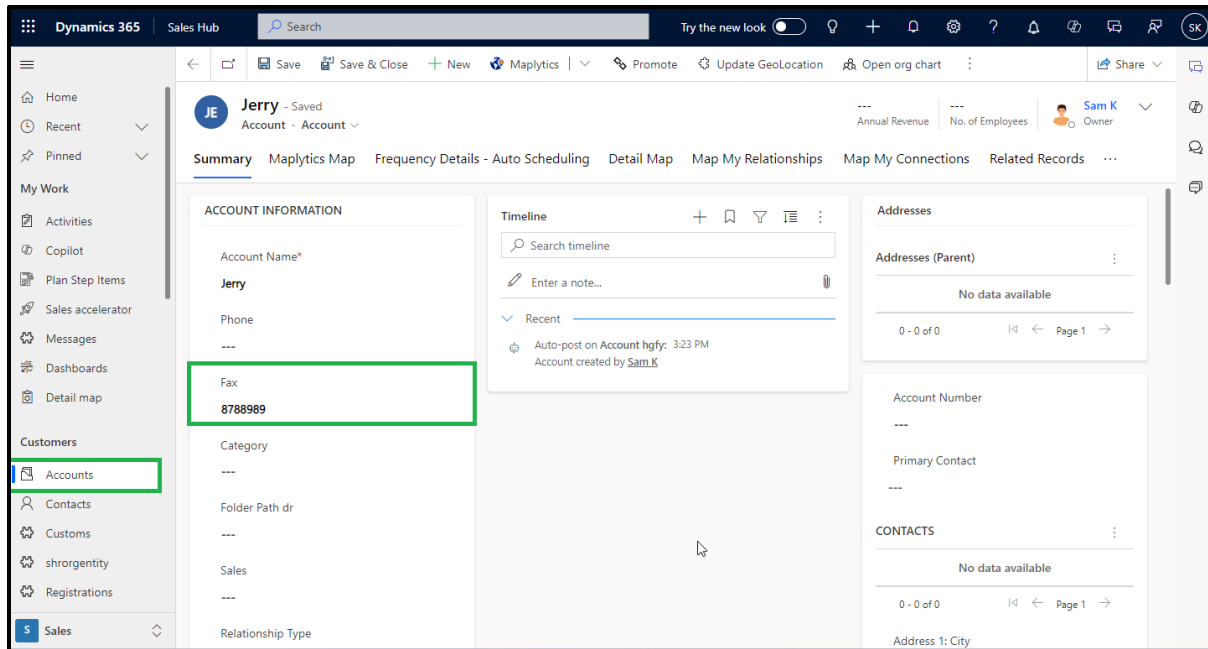


Let's say Sam, a CRM user, is working on the "Jerry" account. The current **fax** number for Jerry's account is "**655768**."

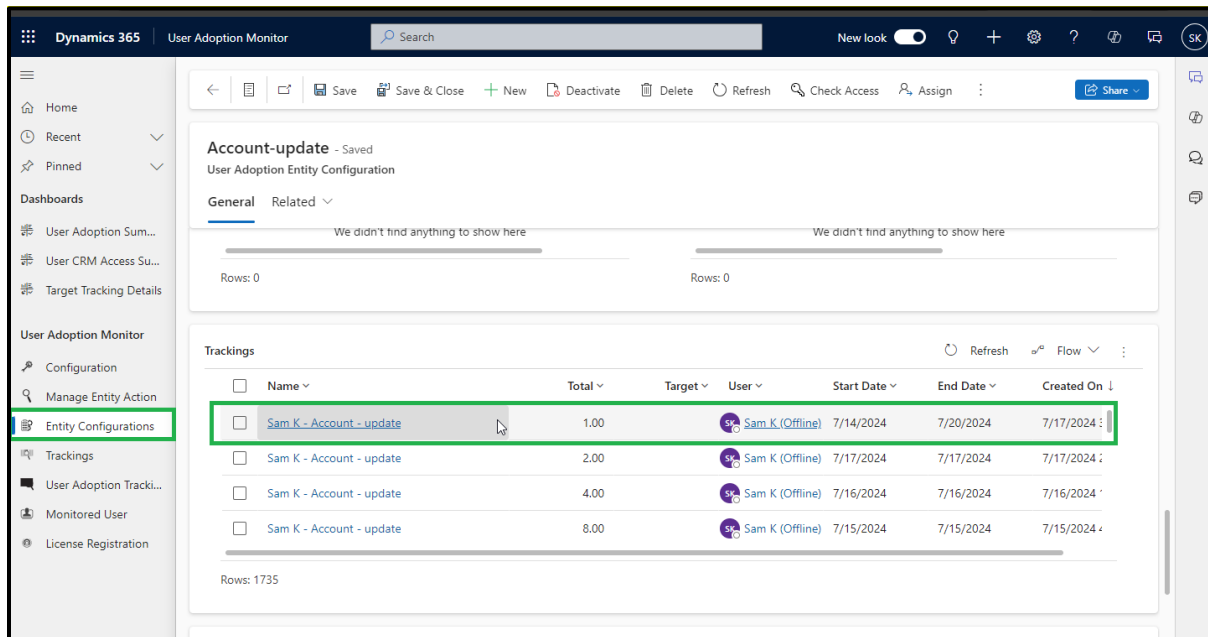


Now, Sam has **updated** the **fax** number to "**8788989**" for the account "Jerry."

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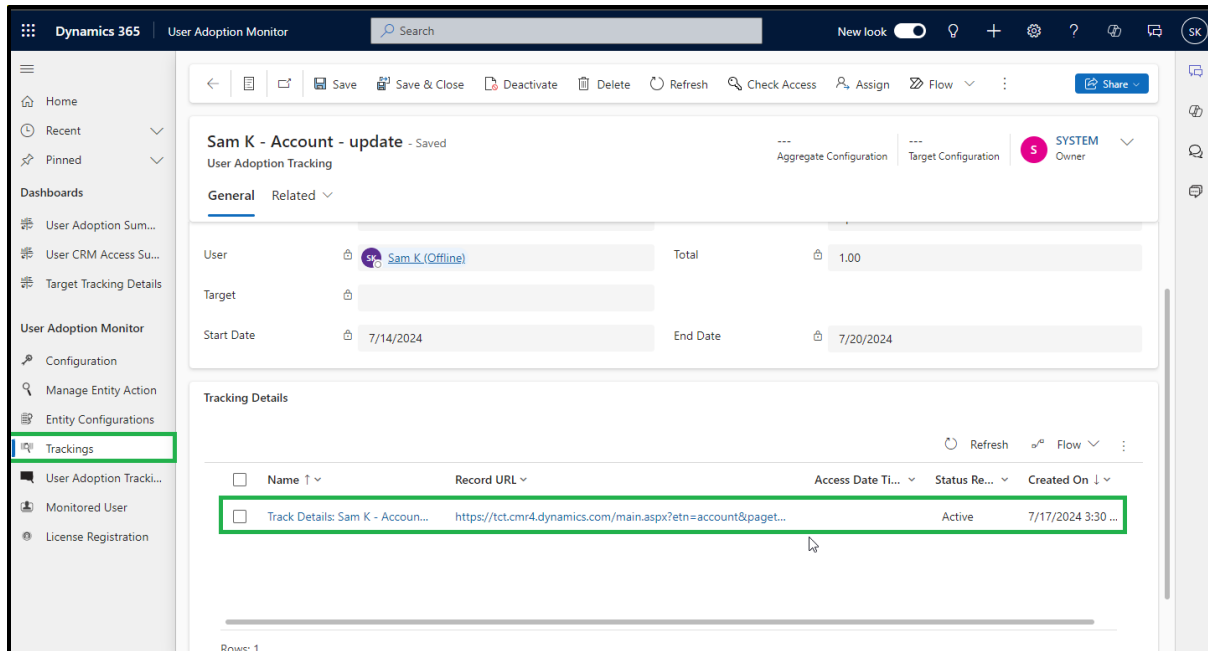


Once the updated Fax is saved by the Sam, it will be get tracked and details will be shown under the Entity Configuration tab of the User Adoption Monitor as follows.

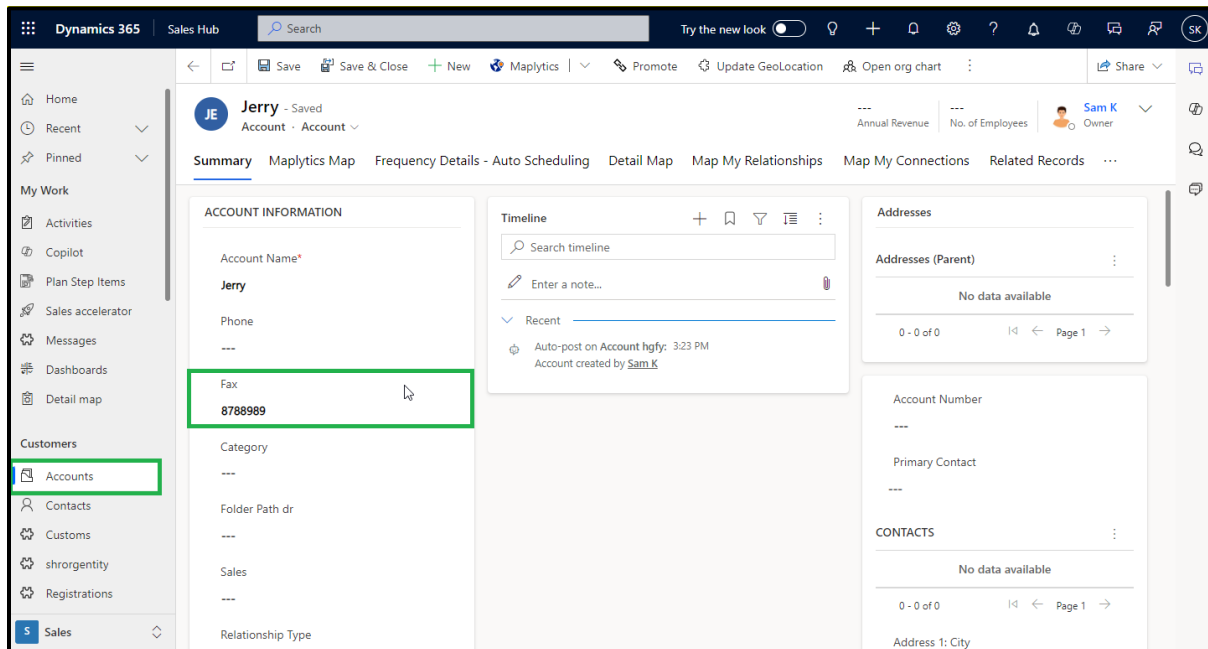


If Mark clicks on track record, the link will be displayed that contains the updates done by Sam.

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Once Mark clicks the link, he will be redirected to the record form and the changes made by Sam will be displayed.



In this way, all updates made to any or all attributes will be monitored based on the changes. This ensures consistency in updates and facilitates easy retrieval of past updates.

## For Lead – Assign (Monthly)

**Note: Apply the same steps to Delete and Assign actions.**

**Lead-assign**  
User Adoption Entity Configuration

**General** Related

Trackings						
✓ 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:

**Dynamics 365** User Adoption Monitor User Adoption Monitor > Trackings

Show Chart Delete Refresh 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 ↓
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

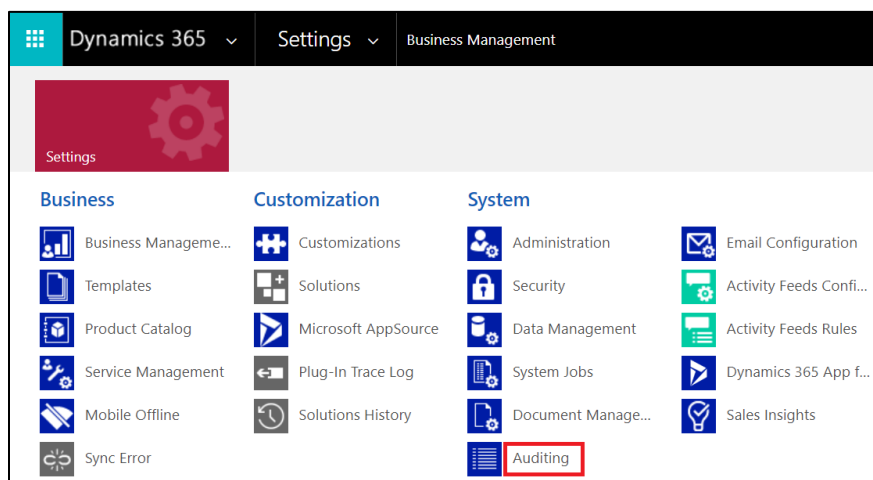
CRM Access Tracking is a feature to track access of the Dynamics CRM users. It enables the managers to monitor the CRM access of their team members by tracking various web activities performed by them in the CRM manually.

**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.

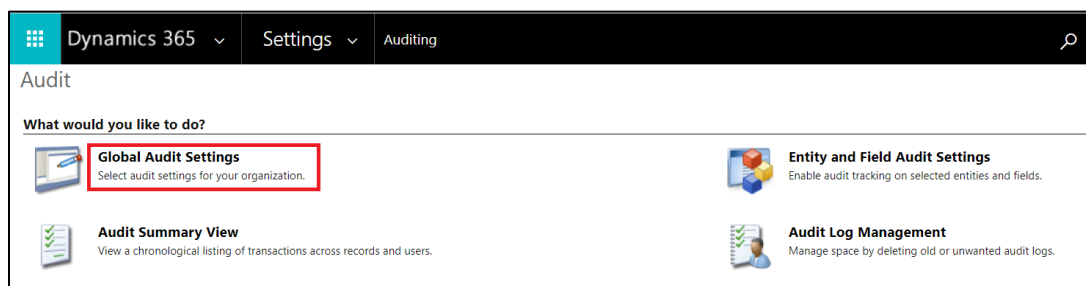
### STEPS TO TRACK USER'S CRM ACCESS

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)



- 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.

## System Settings

Set system-level settings for Microsoft Dynamics 365.

General Formats Auditing Email Marketing Customization Outlook Reporting Calendar Goals Sales Service Synchronization Mobile Client Previews

**Audit Settings**

☒ Start Auditing

☒ Audit user access

☐ Start Read Auditing

View these logs in the Office 365 Security & Compliance Center. [Learn more](#)

**Enable Auditing in the following areas**

☐ Common Entities

☐ Sales Entities

☐ Marketing Entities

☐ Customer Service Entities

For a complete list of Entities and their Audit states visit [Entity and Field Audit Settings](#).

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)
- 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.

Dynamics 365 User Adoption Monitor User Adoption Monitor > Entity Configurations

Show Chart + New Delete Refresh Email a Link Flow Run Report Excel Templates Export to Excel

Active User Adoption Entity Configuration

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

1 - 15 of 15 (0 selected)

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.

The screenshot displays the Dynamics 365 User Adoption Monitor interface. The breadcrumb trail at the top reads: Dynamics 365 > User Adoption Monitor > User Adoption Monitor > Entity Configurations > systemuser-login. The left sidebar contains navigation options: Home, Recent, Pinned, Dashboards (with links to User Adoption Sum..., User CRM Access Su..., and Target Tracking Details), and User Adoption Monitor (with a link to Configuration). The main content area shows the configuration for 'systemuser-login', identified as a 'User Adoption Entity Configuration'. Below this, there are two tabs: 'General' (selected) and 'Related'. The 'General' tab displays a table of configuration attributes:

Name	Value	Owner
Entity Label	systemuser	Nadin Hathway
Entity Schema	systemuser	
Message	login	
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**.

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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 Monitor, Configuration, Manage Entity Action, Entity Configurations, Trackings, Monitored Users, and License Registration. The main area displays the 'systemuser-login' configuration under 'Entity Configurations'. The configuration details include: Name (systemuser-login), Owner (Nadin Hathway), Entity Label (systemuser), Entity Schema (systemuser), Polling (Every 4 Hours), Message (login), Period (Daily), and Preferred Start Time (09:00). Below the configuration is a 'Trackings' table with columns: Name, Total, Target, User, Start Date, End Date, and Created On. The table contains two records: 'InoLink Service Account - systemuser - login' with a Total of 3.00, and 'Nadin Hathway - systemuser - login' with a Total of 27.00. The 'Trackings' table is highlighted with a red border.

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:

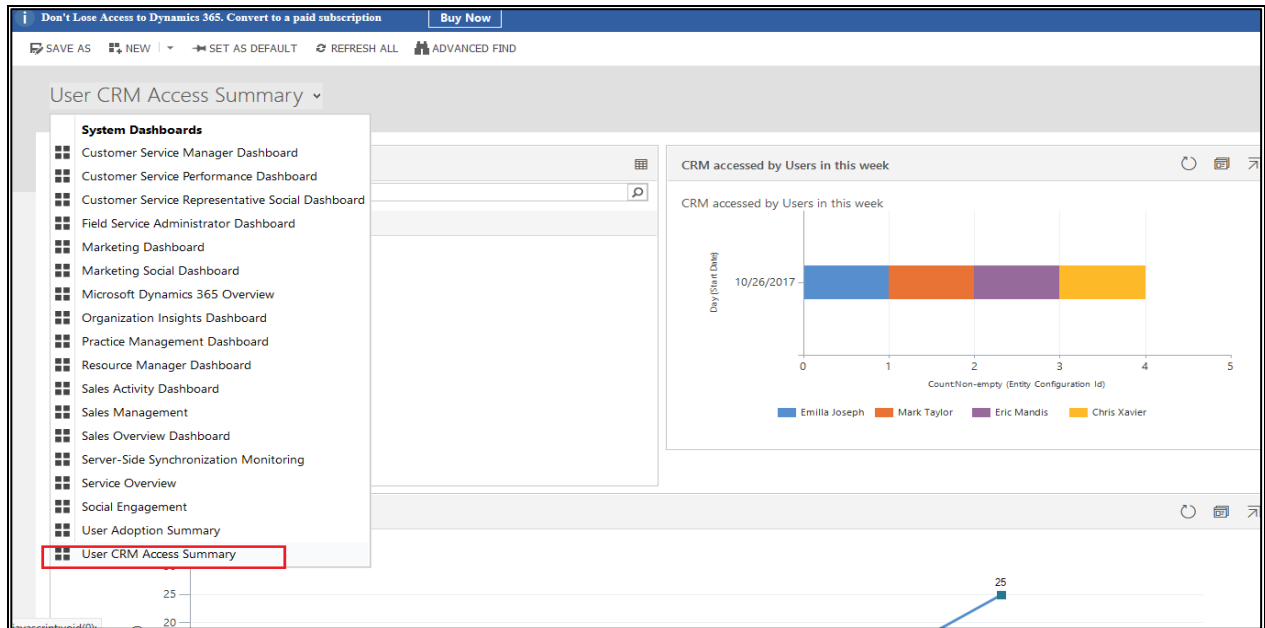
The screenshot shows the Dynamics 365 User Adoption Monitor interface, specifically the 'Trackings' view for 'Nadin Hathway - systemuser - login'. The left sidebar is the same as the previous screenshot. The main area displays the 'Nadin Hathway - systemuser - login' configuration under 'Trackings'. The configuration details include: Entity Label (systemuser), User (Nadin Hathway), Message (login), Total (27.00), Target (---), Start Date (8/6/2020), and End Date (8/6/2020). Below the configuration is a 'Tracking Details' table with columns: Name, Record URL, Access Date Time (for Login only), Status Reason, and Created On. The table contains three records, each showing the 'Access Date Time (for Login only)' and 'Status Reason'.

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

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**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.

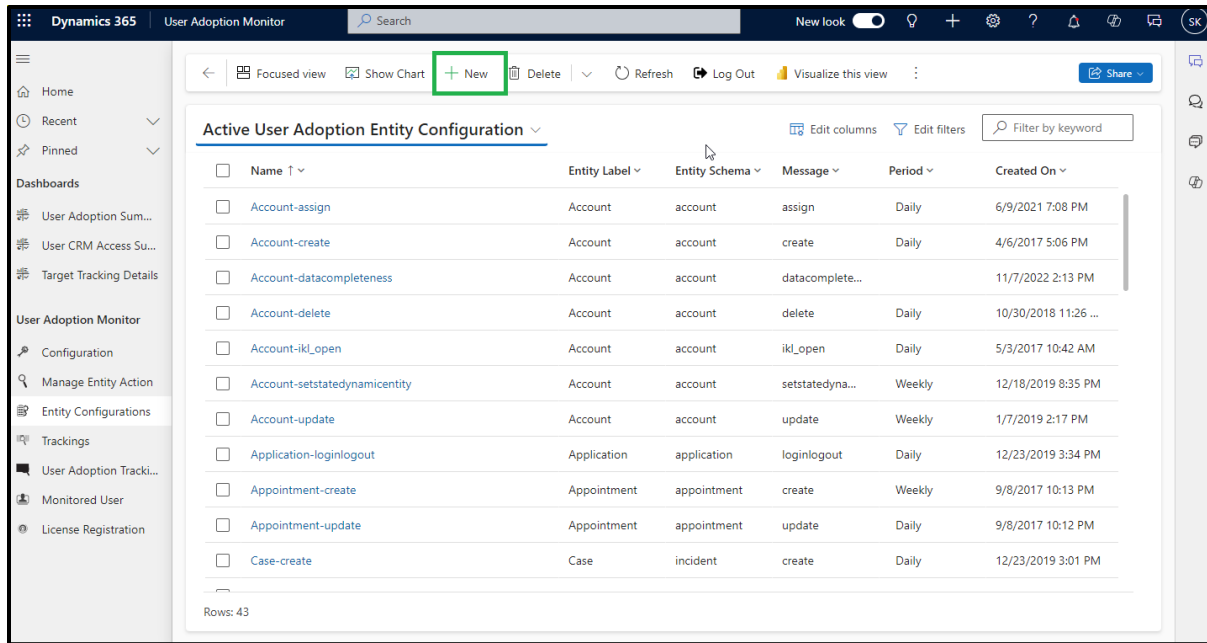
### Log In & Log Out Entity Configuration

**Note:** Either User Adoption Monitor Administrator or User Adoption Monitor User role is necessary to access Log In/Log Out button.

User Adoption Monitor in Dynamics 365 lets you watch when users log in and log out of the CRM system. This tool can track these activities daily, weekly, or monthly.

Navigate to **Entity Configurations (User Adoption Monitor App)** --> Click on “New”

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The screenshot shows the Dynamics 365 User Adoption Monitor interface. The left sidebar contains navigation options like Home, Recent, Pinned, Dashboards, and User Adoption Monitor. The main area displays a table titled 'Active User Adoption Entity Configuration'. The table has columns for Name, Entity Label, Entity Schema, Message, Period, and Created On. A green box highlights the '+ New' button in the top toolbar.

Name	Entity Label	Entity Schema	Message	Period	Created On
Account-assign	Account	account	assign	Daily	6/9/2021 7:08 PM
Account-create	Account	account	create	Daily	4/6/2017 5:06 PM
Account-datacompleteness	Account	account	datacomplete...		11/7/2022 2:13 PM
Account-delete	Account	account	delete	Daily	10/30/2018 11:26 ...
Account-ikl_open	Account	account	ikl_open	Daily	5/3/2017 10:42 AM
Account-setstatedynamicentity	Account	account	setstatedyna...	Weekly	12/18/2019 8:35 PM
Account-update	Account	account	update	Weekly	1/7/2019 2:17 PM
Application-loginlogout	Application	application	loginlogout	Daily	12/23/2019 3:34 PM
Appointment-create	Appointment	appointment	create	Weekly	9/8/2017 10:13 PM
Appointment-update	Appointment	appointment	update	Daily	9/8/2017 10:12 PM
Case-create	Case	incident	create	Daily	12/23/2019 3:01 PM

Fill in the following details:

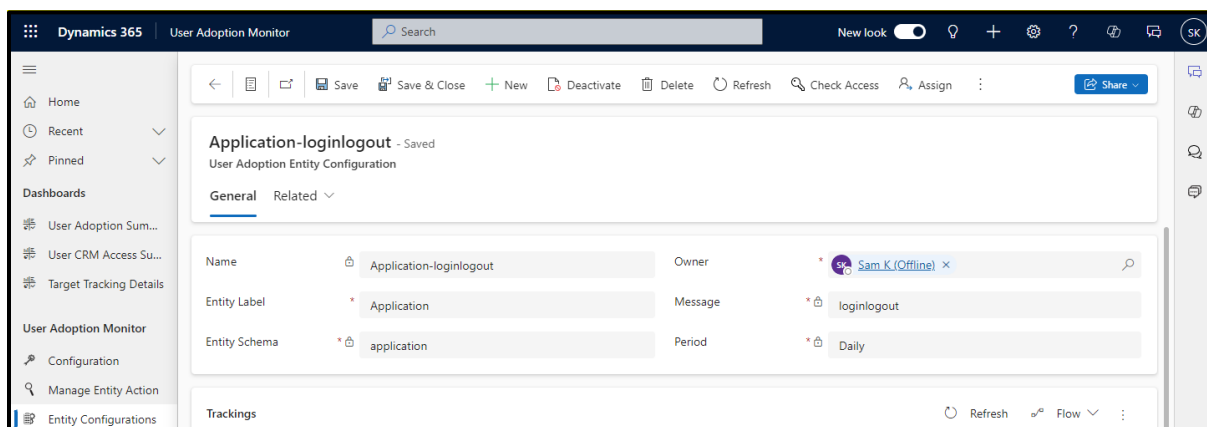
**Entity Label:** Select the display name of the entity i.e. Application

**Entity Schema:** Select the CRM schema name of the entity i.e. Application

**Owner:** Insert the Owner name of the application

**Message:** Enter the message that is supported by the CRM entity. In the current case, the message will be **loginlogout**

**Period:** Select the tracking period based on which monitoring will be performed.



The screenshot shows the Dynamics 365 User Adoption Monitor interface with the 'Application-loginlogout' configuration form. The form is titled 'Application-loginlogout - Saved' and 'User Adoption Entity Configuration'. It has tabs for 'General' and 'Related'. The 'General' tab is active, showing fields for Name, Entity Label, Entity Schema, Owner, Message, and Period. The values are: Name: Application-loginlogout, Entity Label: Application, Entity Schema: application, Owner: Sam K (Offline), Message: loginlogout, and Period: Daily. The 'Trackings' section at the bottom shows a 'Refresh' button and a 'Flow' dropdown.

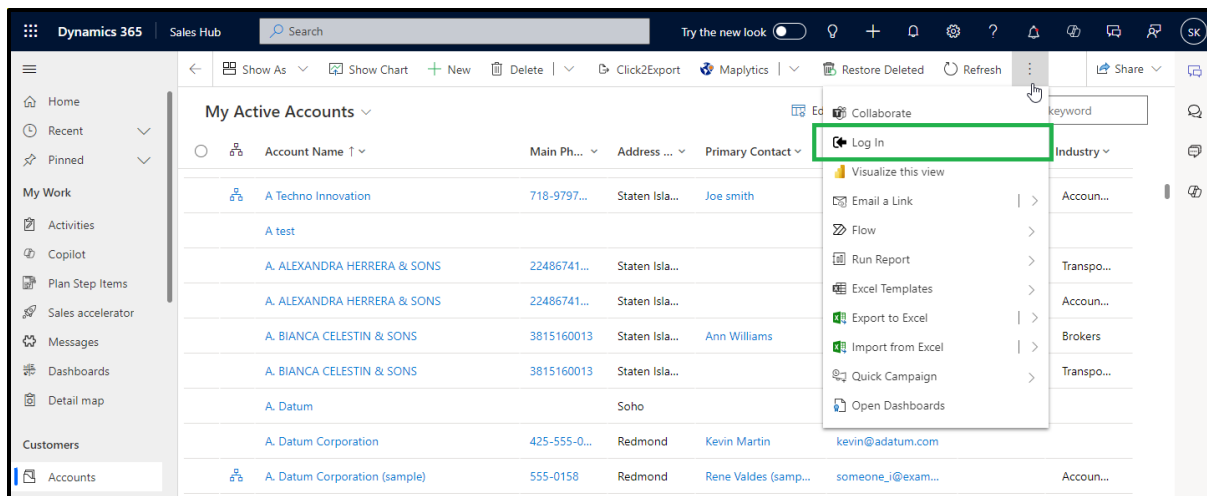
[Click here](#) to do the configuration settings.

For example, Mark is the Sales Manager at Cortana Company, and they use Dynamics 365 CRM to manage their sales team. Mark wants to monitor his team's activities. The log-in and log-out tracking will help him do just that.

In the above case, Mark will set up this tracking for the user who is going to work on any entities under the Application.

When Dynamics 365 CRM users start their work under the Activity entity, the tracker will monitor their activities.

For example, Sam, a Dynamics 365 CRM user, wants to work on the Account entity. To do this Sam will Click on the ellipsis (three dots) in the ribbon bar and then click on **Log In** button.



Once the user (Sam) logs into the CRM, the tracking details will be shown under the **Entity Configuration tab** under the **User Adoption Monitor** app as follows.

## User Adoption Monitor - User Manual

The screenshot shows the Dynamics 365 User Adoption Monitor interface. The left sidebar highlights the 'Entity Configurations' tab. The main area displays the configuration for 'Application-loginlogout' with fields: Name (Application-loginlogout), Owner (Sam K (Offline)), Entity Label (Application), Message (loginlogout), Entity Schema (application), and Period (Daily). Below this is a 'Trackings' table with columns: Name, Total, Target, User, Start Date, End Date, and Created On. The table contains four rows of tracking data for 'Sam K - Application - loginlogout'.

Name	Total	Target	User	Start Date	End Date	Created On
Sam K - Application - loginlogout	2.00		Sam K (Offline)	7/15/2024	7/15/2024	7/15/2024 2:3
Sam K - Application - loginlogout	4.00		Sam K (Offline)	7/11/2024	7/11/2024	7/11/2024 3:4
Sam K - Application - loginlogout	1.00		Sam K (Offline)	6/10/2024	6/10/2024	6/10/2024 3:2
Sam K - Application - loginlogout	2.00		Sam K (Offline)	6/3/2024	6/3/2024	6/3/2024 9:54

Once the Dynamics 365 CRM user finishes the task, they will log out of the Account entity. To do this, Sam will click on an ellipsis from the ribbon bar and then Click on the **Log Out** button.

The screenshot shows the Dynamics 365 Sales Hub interface. The left sidebar highlights the 'Accounts' tab. The main area displays a list of 'My Active Accounts' with columns: Account Name, Main Ph..., Address..., and Primary Contact. The ribbon bar at the top right shows the 'Log Out' button highlighted in the 'More' menu.

Account Name	Main Ph...	Address ...	Primary Contact
A Techno Innovation	718-9797...	Staten Isla...	Joe smith
A test			
A. ALEXANDRA HERRERA & SONS	22486741...	Staten Isla...	
A. ALEXANDRA HERRERA & SONS	22486741...	Staten Isla...	
A. BIANCA CELESTIN & SONS	3815160013	Staten Isla...	Ann Williams
A. BIANCA CELESTIN & SONS	3815160013	Staten Isla...	
A. Datum		Soho	
A. Datum Corporation	425-555-0...	Redmond	Kevin Martin
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (samp...

Once the user (Sam) logs out of the CRM, the tracking details will be shown under the **Entity Configuration** tab of the **User Adoption Monitor** as follows.



The screenshot displays the Dynamics 365 User Adoption Monitor interface. The left sidebar shows the navigation menu with 'Entity Configurations' highlighted. The main area shows the configuration for the 'Application-loginlogout' entity. Below the configuration, a table titled 'Trackings' lists user actions. The table has columns for Name, Total, Target, User, Start Date, End Date, and Created On. The first row is highlighted, showing a total of 3.00 for the user 'Sam K (Offline)' on 7/15/2024.

Name	Total	Target	User	Start Date	End Date	Created On
Sam K - Application - loginlogout	3.00		Sam K (Offline)	7/15/2024	7/15/2024	7/15/2024 :
Sam K - Application - loginlogout	4.00		Sam K (Offline)	7/11/2024	7/11/2024	7/11/2024 :
Sam K - Application - loginlogout	1.00		Sam K (Offline)	6/10/2024	6/10/2024	6/10/2024 :
Sam K - Application - loginlogout	2.00		Sam K (Offline)	6/3/2024	6/3/2024	6/3/2024 9:

Here, under the "**Total**" tab, you can see that the value increases with each action performed by Sam. Each time a user logs in or out of the application, the action count will go up.

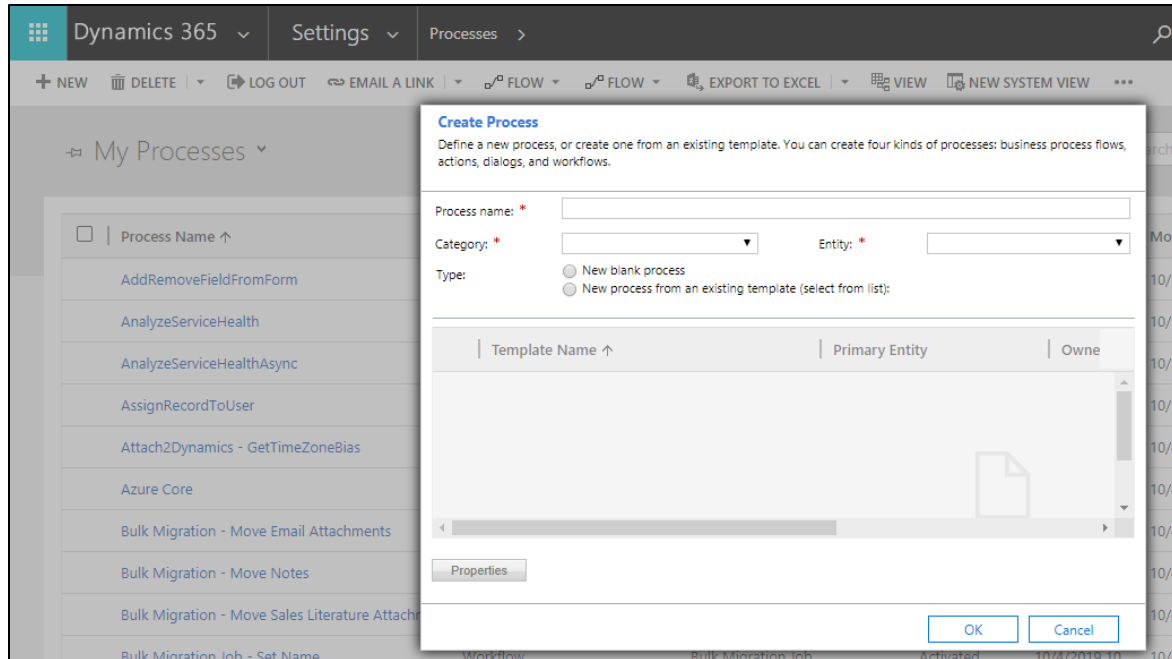
### Check-in & Check-out Entity Configuration

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

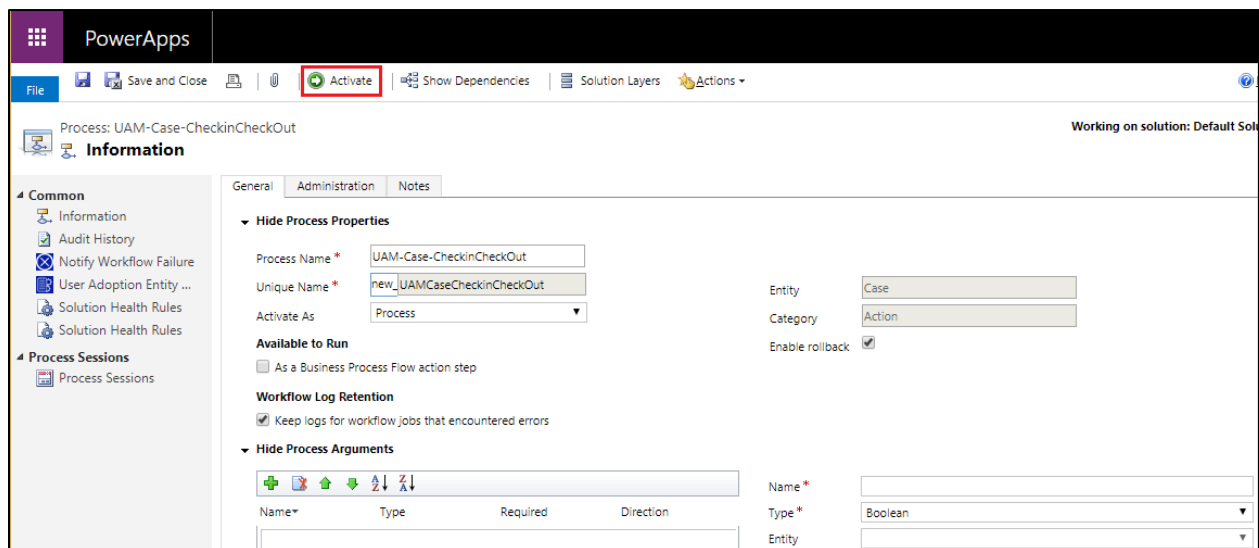
User Adoption Monitor in Dynamics 365 lets you keep track of records that each user worked on. It will specify the time spent by a user on records in a particular Entity. This tool can track activities on a daily, weekly, or monthly basis.

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.

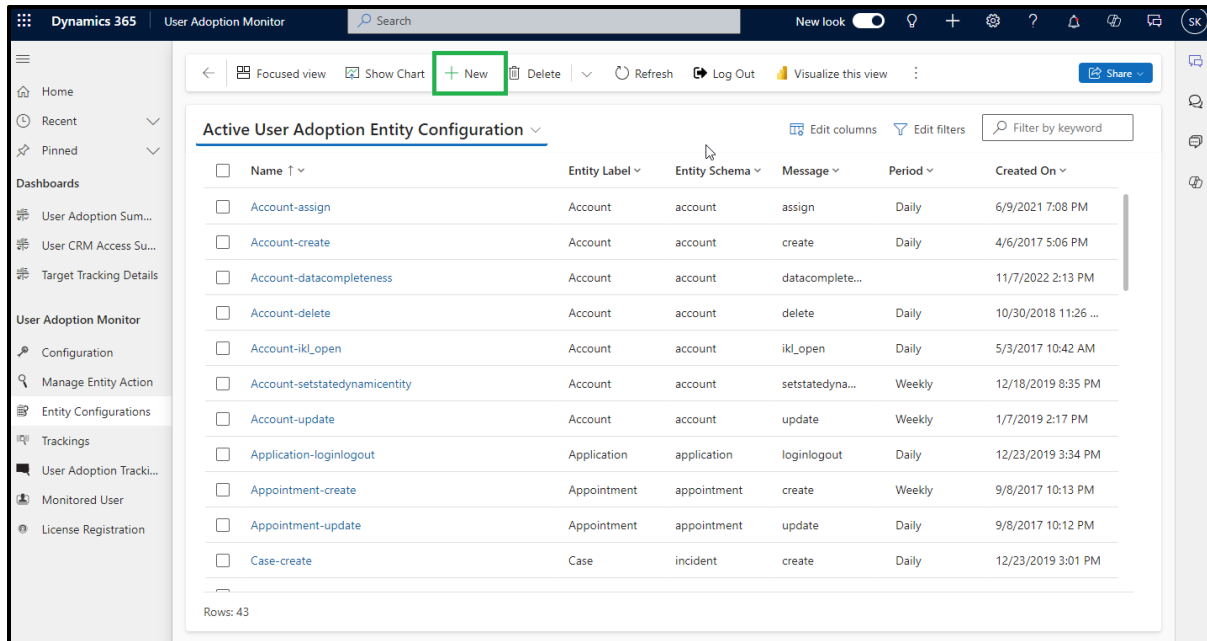


- Next, fill the required fields as follows:
  - **Process name:** Name the process, for e.g. UAM-Case-CheckInCheckOut
  - **Category:** Select 'Action'
  - **Entity:** Select the required entity. Here 'Case' entity is selected
- Once the details are filled, click on Ok. Then 'Activate' the action as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



Navigate to **Entity Configurations --> Click on the “New” button under User Adoption Monitor**

## User Adoption Monitor - User Manual



The screenshot shows the Dynamics 365 User Adoption Monitor interface. The left sidebar contains navigation options: Home, Recent, Pinned, Dashboards, User Adoption Monitor, Configuration, Manage Entity Action, Entity Configurations, Trackings, User Adoption Tracki..., Monitored User, and License Registration. The main area displays a table titled 'Active User Adoption Entity Configuration'. The table has columns: Name, Entity Label, Entity Schema, Message, Period, and Created On. A '+ New' button is highlighted with a green box in the top toolbar. Below the table, it indicates 'Rows: 43'.

Name	Entity Label	Entity Schema	Message	Period	Created On
Account-assign	Account	account	assign	Daily	6/9/2021 7:08 PM
Account-create	Account	account	create	Daily	4/6/2017 5:06 PM
Account-datacompleteness	Account	account	datacomplete...		11/7/2022 2:13 PM
Account-delete	Account	account	delete	Daily	10/30/2018 11:26 ...
Account-ikl_open	Account	account	ikl_open	Daily	5/3/2017 10:42 AM
Account-setstatedynamicentity	Account	account	setstatedyna...	Weekly	12/18/2019 8:35 PM
Account-update	Account	account	update	Weekly	1/7/2019 2:17 PM
Application-loginlogout	Application	application	loginlogout	Daily	12/23/2019 3:34 PM
Appointment-create	Appointment	appointment	create	Weekly	9/8/2017 10:13 PM
Appointment-update	Appointment	appointment	update	Daily	9/8/2017 10:12 PM
Case-create	Case	incident	create	Daily	12/23/2019 3:01 PM

**Fill the following details:**

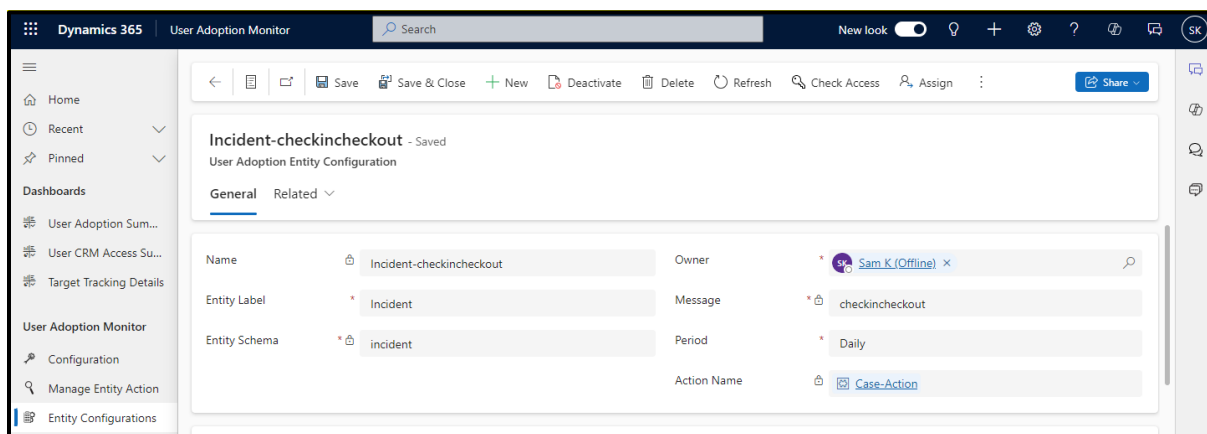
**Entity Label:** Select the display name of the entity i.e. Incident

**Entity Schema:** Select the CRM schema name of the entity i.e. Incident

**Owner:** Insert the Owner name of the application

**Message:** Enter the message that is supported by the CRM entity. In the current case, the message will be **checkincheckout**.

**Period:** Select the tracking period based on which monitoring will be performed.



The screenshot shows the Dynamics 365 User Adoption Monitor interface with the 'Incident-checkincheckout' configuration form. The form is titled 'Incident-checkincheckout - Saved' and 'User Adoption Entity Configuration'. It has tabs for 'General' and 'Related'. The 'General' tab is active, showing fields for Name, Entity Label, Entity Schema, Owner, Message, Period, and Action Name. The values are: Name: Incident-checkincheckout, Entity Label: Incident, Entity Schema: incident, Owner: Sam K (Offline), Message: checkincheckout, Period: Daily, and Action Name: Case-Action.

Name	Entity Label	Entity Schema	Owner	Message	Period	Action Name
Incident-checkincheckout	Incident	incident	Sam K (Offline)	checkincheckout	Daily	Case-Action

[Click here](#) to do the Configuration Setting

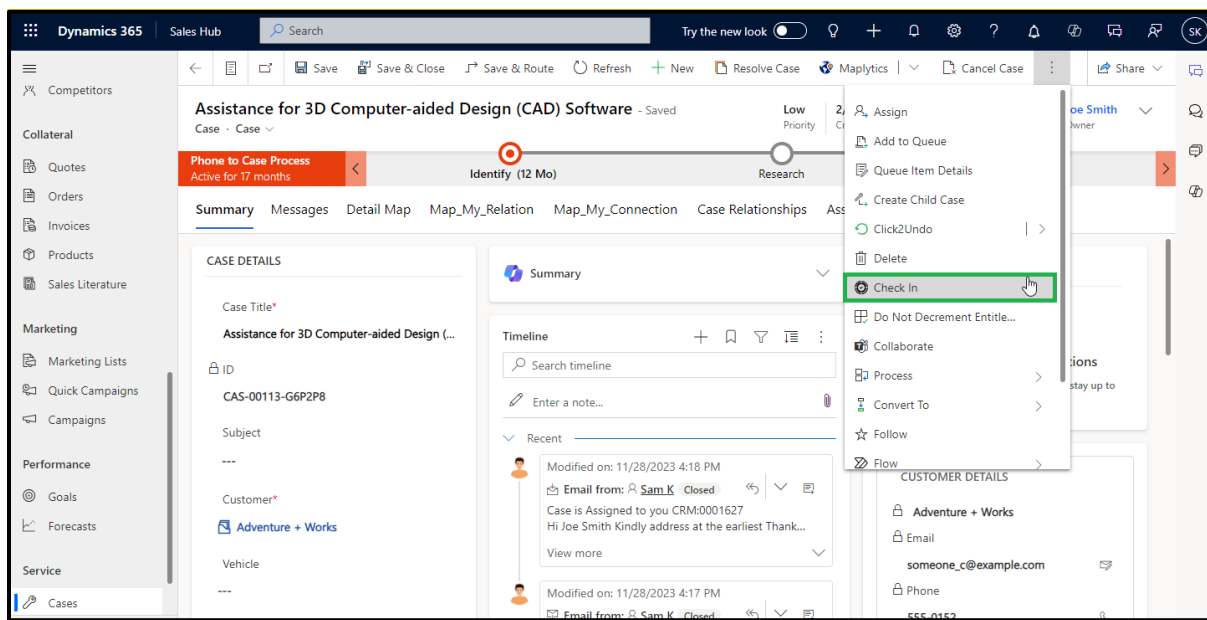
For example, Mark is the Sales Manager at Cortana Company, and they use Dynamics 365 CRM to manage their sales team. Mark wants to monitor his team's activities. The check-in and check-out tracking will help him do just that.

In the above case, Mark will set up this tracking for the "Case" entity.

When Dynamics 365 CRM users start their work, the tracker will start keeping track of records of users they working on.

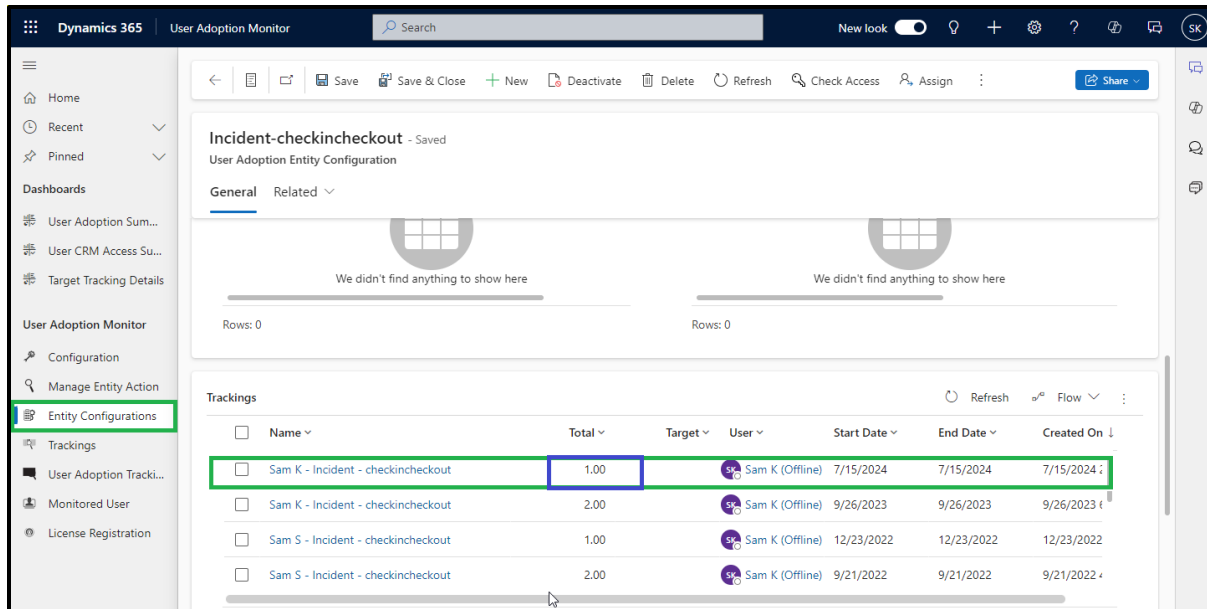
For example, Sam, a Dynamics 365 CRM user, wants to work on the Case entity record.

To do this, Sam will click on an ellipsis from the ribbon bar and then he will click on **Check-In** button.



Once the user Checks into the CRM, the tracking details will be shown under the Entity Configuration tab of the User Adoption Monitor as follows.

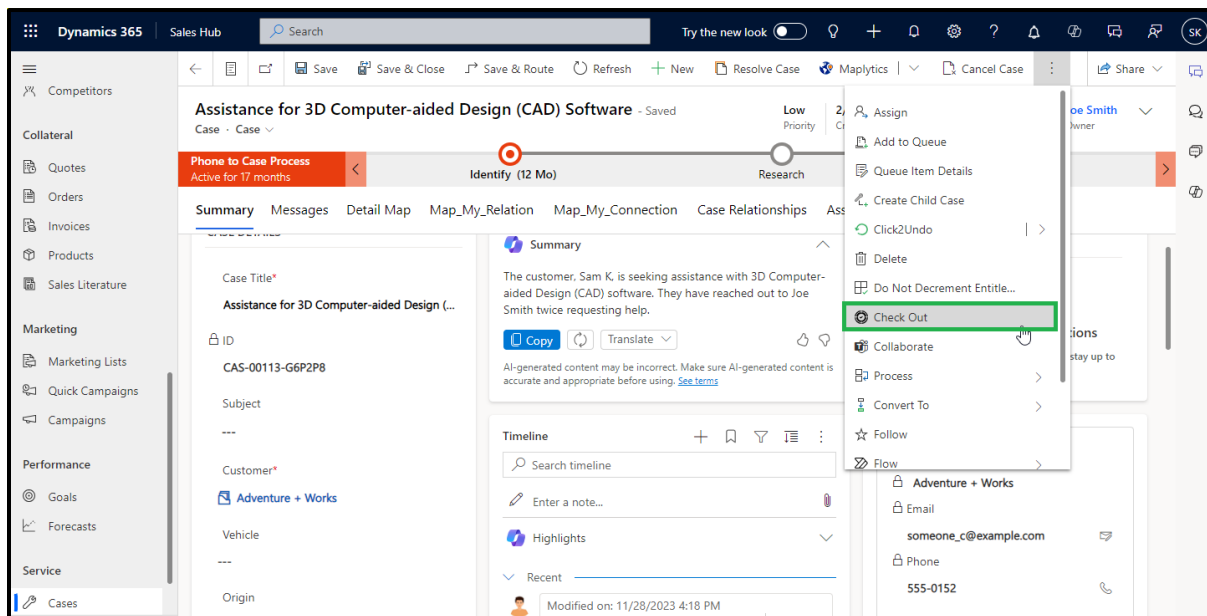
## User Adoption Monitor - User Manual



The screenshot shows the Dynamics 365 User Adoption Monitor interface. The left sidebar has 'Entity Configurations' highlighted. The main area displays a table of 'Trackings' for the 'Incident-checkincheckout' entity configuration.

Name	Total	Target	User	Start Date	End Date	Created On
Sam K - Incident - checkincheckout	1.00		Sam K (Offline)	7/15/2024	7/15/2024	7/15/2024
Sam K - Incident - checkincheckout	2.00		Sam K (Offline)	9/26/2023	9/26/2023	9/26/2023
Sam S - Incident - checkincheckout	1.00		Sam K (Offline)	12/23/2022	12/23/2022	12/23/2022
Sam S - Incident - checkincheckout	2.00		Sam K (Offline)	9/21/2022	9/21/2022	9/21/2022

Once the Dynamics 365 CRM user (Sam) finishes the task, they will check out from the record. To do this, Sam will click on an ellipsis from the ribbon bar and then he will click on the **Check Out** button.



The screenshot shows the Dynamics 365 CRM interface for a case titled 'Assistance for 3D Computer-aided Design (CAD) Software'. The ribbon bar at the top has a dropdown menu open, and the 'Check Out' button is highlighted.

Case Title: Assistance for 3D Computer-aided Design (CAD) Software - Saved

Case ID: CAS-00113-G6P2P8

Subject: Assistance for 3D Computer-aided Design (CAD) Software

Customer: Adventure + Works

Vehicle: ---

Origin: ---

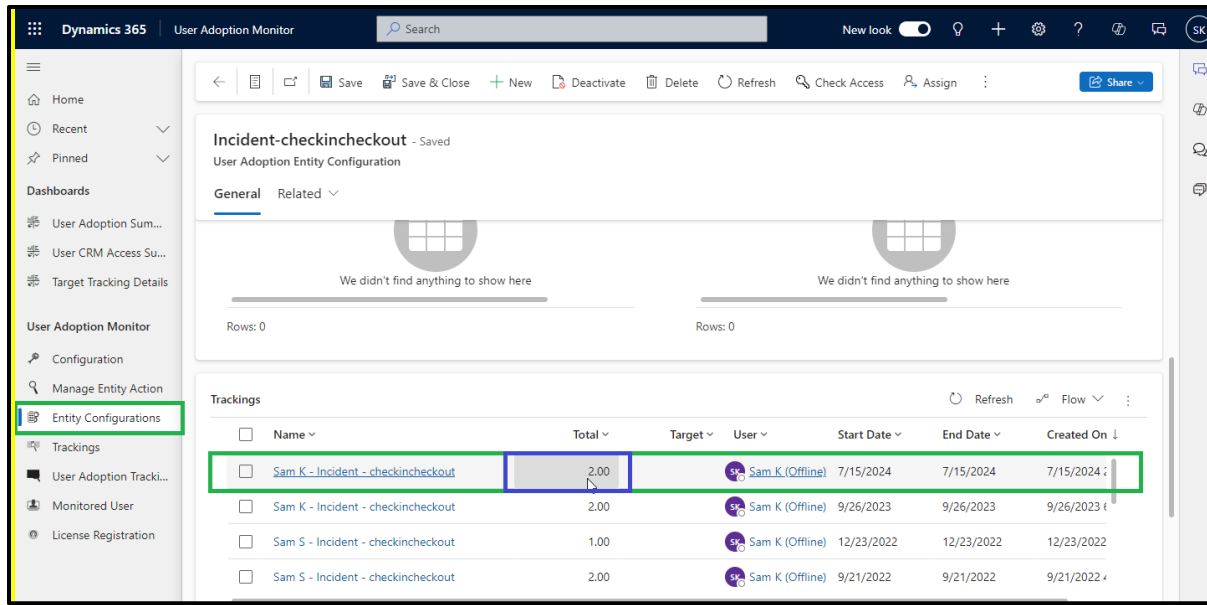
Timeline: Search timeline, Enter a note..., Highlights, Recent

Modified on: 11/28/2023 4:18 PM

Ribbon Bar: Assign, Add to Queue, Queue Item Details, Create Child Case, Click2Undo, Delete, Do Not Decrement Entitle..., **Check Out**, Collaborate, Process, Convert To, Follow, Flow, Adventure + Works, Email, someone\_c@example.com, Phone, 555-0152

Once the user (Sam) Checks out of the CRM, the tracking details will be shown under the Entity Configuration column of the User Adoption Monitor as follows.

## User Adoption Monitor - User Manual



Incident-checkincheckout - Saved  
User Adoption Entity Configuration

General Related ▾

We didn't find anything to show here

Rows: 0

Rows: 0

Trackings

<input type="checkbox"/>	Name ▾	Total ▾	Target ▾	User ▾	Start Date ▾	End Date ▾	Created On ▾
<input type="checkbox"/>	Sam K - Incident - checkincheckout	2.00		Sam K (Offline)	7/15/2024	7/15/2024	7/15/2024
<input type="checkbox"/>	Sam K - Incident - checkincheckout	2.00		Sam K (Offline)	9/26/2023	9/26/2023	9/26/2023
<input type="checkbox"/>	Sam S - Incident - checkincheckout	1.00		Sam K (Offline)	12/23/2022	12/23/2022	12/23/2022
<input type="checkbox"/>	Sam S - Incident - checkincheckout	2.00		Sam K (Offline)	9/21/2022	9/21/2022	9/21/2022

Here, under the "**Total**" column, you can see that the value increases with each action performed. Each time a user checks in or out of the application, the action count will go up.

### 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 the following items: Home, Recent, Pinned, Dashboards, User Adoption Sum..., User CRM Access Su..., Target Tracking Details, User Adoption Monitor, Configuration, Manage Entity Action, **Entity Configurations** (highlighted with a red box), Trackings, Monitored Users, and License Registration. The main form area has a title bar with 'Save', 'Save & Close', '+ New', and 'Flow' buttons. Below the title bar is the 'New User Adoption Entity Configuration' header. The 'General' tab is active, showing a form with the following fields: Name (with a dropdown icon), Entity Label (marked with a red asterisk), Entity Schema (marked with a red asterisk), Owner (with a green checkmark and a user icon for 'Thomas Perry'), Message (marked with a red asterisk), and Period (marked with a red asterisk). The form is currently empty, with all text fields showing '---'.

- 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

The screenshot shows the 'New User Adoption Entity Configuration' page in Dynamics 365. The page has a left sidebar with navigation options like Home, Recent, Pinned, Dashboards, and User Adoption Monitor. The main area is titled 'New User Adoption Entity Configuration' and includes tabs for 'General' and 'Related'. The 'General' tab contains fields for Name, Entity Label (set to 'Opportunity'), Entity Schema (set to 'opportunity'), Owner (Thomas Perry), Message (win), and Period (Monthly). Below these are two sections: 'Active User Adoption Aggregate Configurations' and 'Active User Adoption Target Configurations', both of which currently show 'No data available.'

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

This screenshot shows the same 'New User Adoption Entity Configuration' page, but with a dropdown menu open for the 'Active User Adoption Aggregate Configurations' section. The dropdown menu contains several options: '+ New Aggregate Configurati...', 'Refresh', 'Run Report', 'Excel Templates', 'Export User Adoption Aggr...', and 'See associated records'. The '+ New Aggregate Configurati...' option is highlighted with a red rectangular box.

- 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

The screenshot shows the 'New Aggregate Configuration' form in Dynamics 365. The 'General' tab is active. The 'Name' field is empty. The 'Entity Configuration' is set to 'Opportunity-win'. The 'Aggregate On' dropdown menu is open, showing 'Actual Revenue' selected. The 'Aggregate Type' is set to 'SUM'.

- 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.

The screenshot shows the 'Opportunity-win' entity configuration in Dynamics 365. The 'General' tab is active. The 'Aggregate Trackings' table is displayed, showing a row for 'Robredo Silva - Opportunity - win - Actual Revenue' with a value of 20,000.00.

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

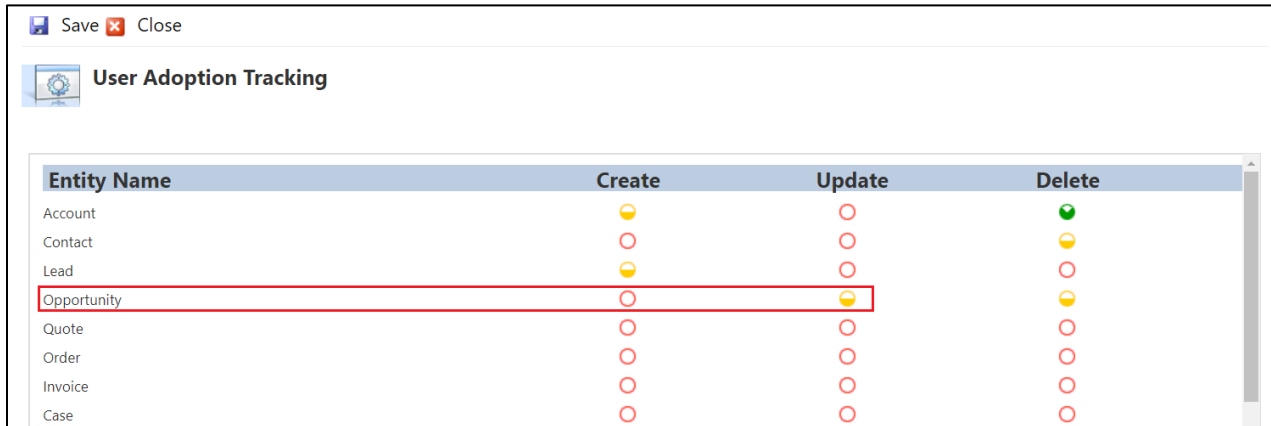
In addition to this, there is another functionality incorporated in User Adoption Monitor that gives the provision to calculate the aggregation for specific statuses of the entity record on 'Update' entity action.

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

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'.

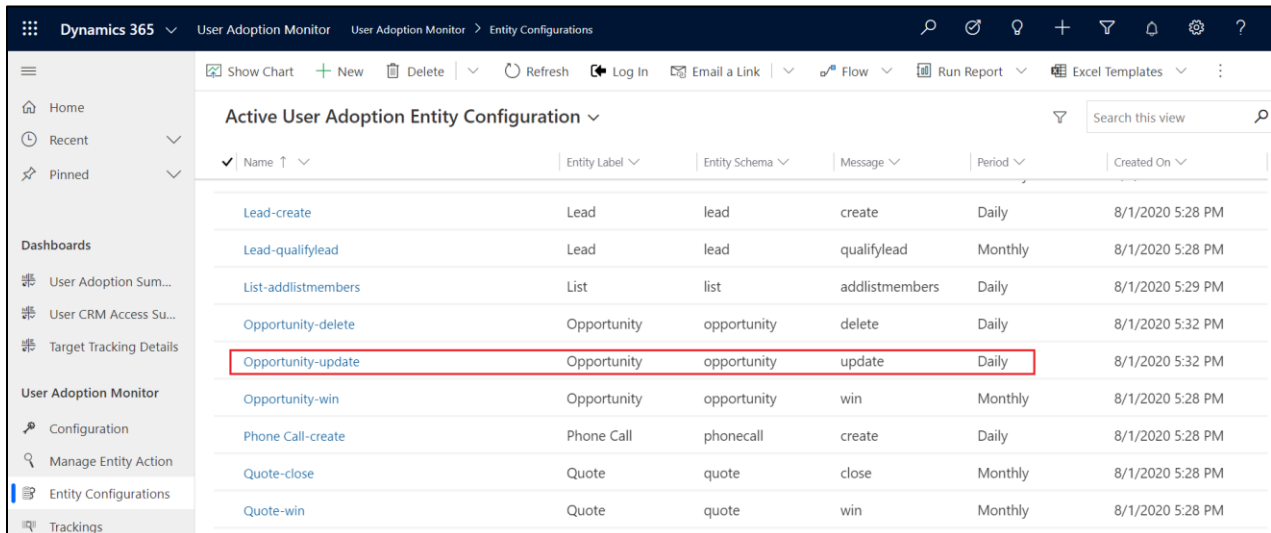
Let's follow the below steps to accomplish the above requirement.

- 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	○	○	○

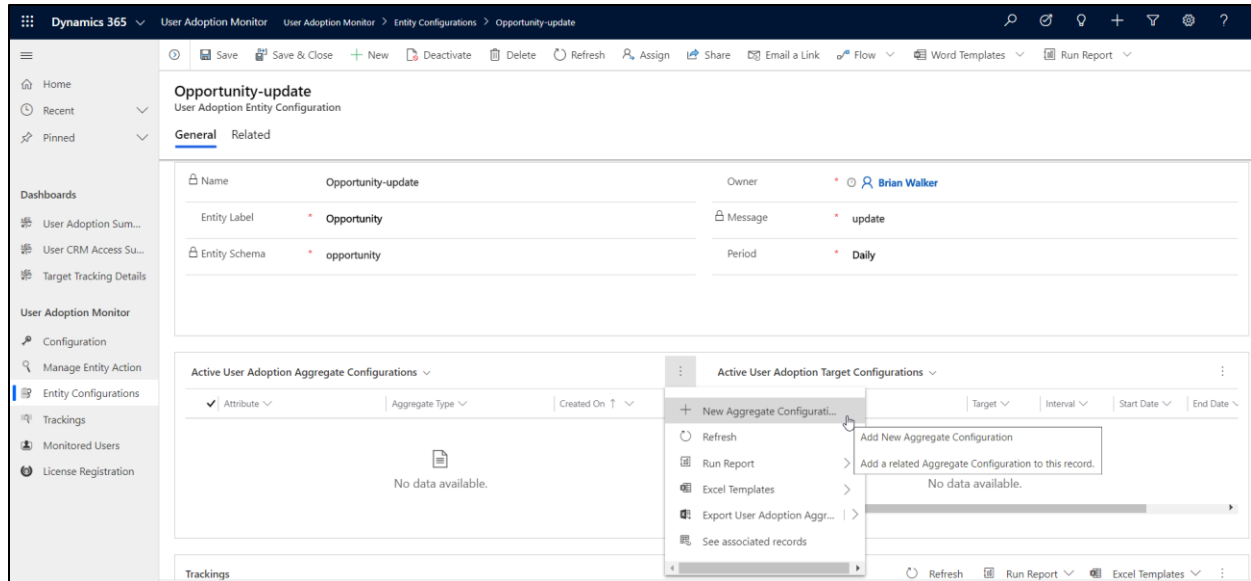
- Click on Save.
- Once the above entity action is saved successfully, you will see the '**Opportunity-update**' entity configuration created under 'Active User Adoption Entity Configuration'.



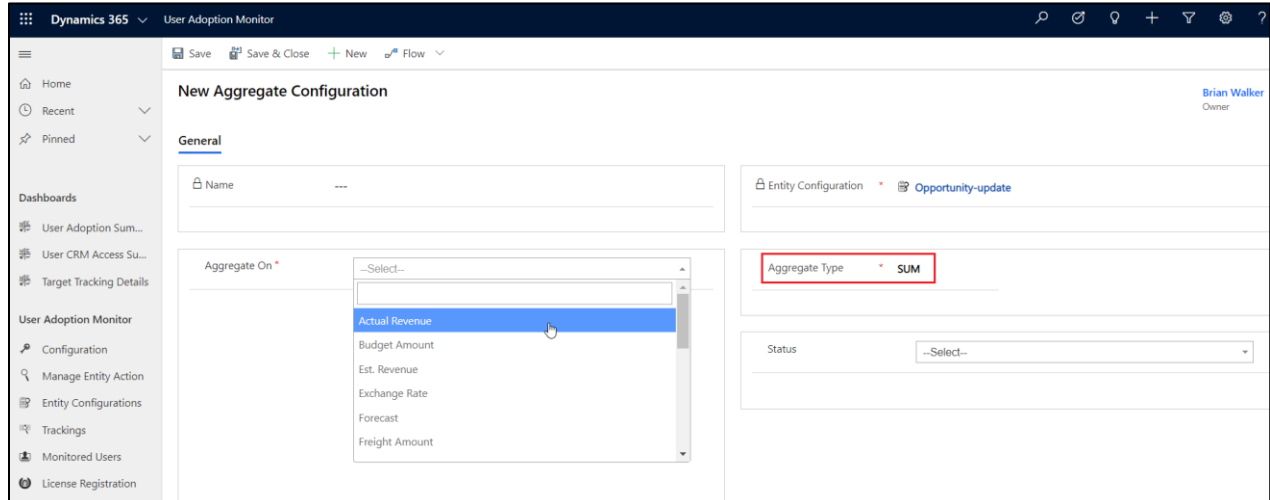
Name	Entity Label	Entity Schema	Message	Period	Created On
Lead-create	Lead	lead	create	Daily	8/1/2020 5:28 PM
Lead-qualifylead	Lead	lead	qualifylead	Monthly	8/1/2020 5:28 PM
List-addlistmembers	List	list	addlistmembers	Daily	8/1/2020 5:29 PM
Opportunity-delete	Opportunity	opportunity	delete	Daily	8/1/2020 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** Brian Walker  
Owner

**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:

**Dynamics 365** User Adoption Monitor > User Adoption Monitor > Entity Configurations > Opportunity-update

**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

**Active User Adoption Target Configurations**

Name	Target
------	--------

- 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 Sales Hub interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', 'Sales', 'Opportunities', and 'Interested in PC Games'. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities (selected), Competitors, Collateral, Quotes, and Orders. The main content area displays the 'Interested in PC Games' opportunity record. The 'Summary' tab is active, showing fields like Topic, Contact, Account, Purchase Timeframe, Currency (US Dollar), Budget Amount, Purchase Process, Description, Forecast Category, and Pipeline. The 'Actual Revenue' field is highlighted with a red box and shows a value of \$10,000.00. The 'Timeline' section on the right 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.

This screenshot shows the same Dynamics 365 Sales Hub interface as the previous one, but with the 'Budget Amount' field updated to \$20,000.00. The 'Actual Revenue' field remains at \$10,000.00. The rest of the interface, including the navigation bar, sidebar, and other sections, is identical to 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.

Opportunity-update User Adoption Entity Configuration							
General Related							
Trackings							
✓ 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	
Aggregate Trackings							
✓ 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

✓ Attribute Aggregate Type Created On

No data available.

Active User Adoption Target Configurations

✓ Name

+ 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 'User Adoption Monitor' interface. The main panel displays the 'Opportunity - win - Actual Revenue - SUM' configuration. The 'General' tab is active, showing 'Target Configuration' with a 'Target' of 50,000.00 and an 'Interval' of 'Recurring'. Below this, a 'Users' table is shown with the message 'No data available.' A 'Lookup Records' dialog is open on the right, showing a search for 'Robredo Silva' and a 'Select record' button. The dialog also has a 'Cancel' button.

- 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 'General' tab is active, showing 'User Adoption Entity Configuration'. Below this, a table titled 'Aggregate Trackings' is displayed. The table has columns for 'Name', 'Total', 'Target', 'User', 'Start Date', 'End Date', and 'Created On'. A row is highlighted with a red border, showing 'Robredo Silva - Opportunity - win - Actual Revenue' with a 'Total' of 20,000.00 and a 'Target' of 50,000.00. The 'User' column shows 'Robredo Silva' and the 'Start Date' is '7/24/2020'.

### 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

Refresh

Run Report

Name	Total	Target	User	Start Date	End Date	Created On
Robredo Silva - Opportunity - win	2.00	10.00	Robredo Silva	7/24/2020	7/24/2020	7/24/2020 6:00 ...

### 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. 8<sup>th</sup> August 2020 – 8<sup>th</sup> 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. 1<sup>st</sup> August 2020 – 31<sup>st</sup> 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

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

Active User Adoption Target Configurations

Target	Interval	Start Date	End Date	Create...
ual Revenue - SUM	Fixed	7/24/2020	7/29/2020	7/24/2020...
ual Revenue - SUM	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.

- 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:

**New User Adoption Entity Configuration**

**General**

Name: --- Owner: Nadin Hathway

Entity Label: \* Contact Message: \* datacompleteness

Entity Schema: \* contact

**Attributes For Data Completeness**

Schema Name	Logical Name	Type
<input type="checkbox"/> DoNotPhone	donotphone	Boolean
<input type="checkbox"/> DoNotPostalMail	donotpostalmail	Boolean
<input type="checkbox"/> DoNotSendMM	donotsendmm	Boolean
<input checked="" type="checkbox"/> EmailAddress1	emailaddress1	String
<input type="checkbox"/> EmailAddress2	emailaddress2	String
<input type="checkbox"/> EmailAddress3	emailaddress3	String
<input type="checkbox"/> EmployeeId	employeeid	String
<input type="checkbox"/> FamilyStatusCode	familystatuscode	Picklist
<input type="checkbox"/> Fax	fax	String
<input type="checkbox"/> FirstName	firstname	String
<input type="checkbox"/> FollowEmail	followemail	Boolean
<input type="checkbox"/> PtpSiteUrl	ptpsiteurl	String
<input type="checkbox"/> GenderCode	gendercode	Picklist
<input type="checkbox"/> GovernmentId	governmentid	String

- 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

PJ

Patrick Jane

Contact · Contact ▾

Incomplete Completeness ▾

Summary Details Scheduling Files Related

CONTACT INFORMATION

First Name

Patrick

Last Name

Jane

Job Title

---

Account Name

---

Email

patrick@gmail.com

Business Phone

---

Mobile Phone

---

Fax

---

Timeline

Search timeline

Enter a note...

Auto-post on Patrick Jane

Contact: Created By Thomas Perry.

7/26/2020 11:19 AM

Assistant

No notifications or suggestions

Check back later to see what's new and stay up to date.

Company

---

Opportunities

No data available.

PJ

Patrick Jane

Contact · Contact ▾

Complete Completeness

Summary Details Scheduling Files Related

CONTACT INFORMATION

First Name

Patrick

Last Name

Jane

Job Title

---

Account Name

---

Email

patrick@gmail.com

Business Phone

544545445

Mobile Phone

---

Timeline

Search timeline

Enter a note...

Auto-post on Patrick Jane

Contact: Created By Thomas Perry.

7/26/2020 11:19 AM

Assistant

No notifications or suggestions

Check back later to see what's new and stay up to date.

Company

---

Opportunities

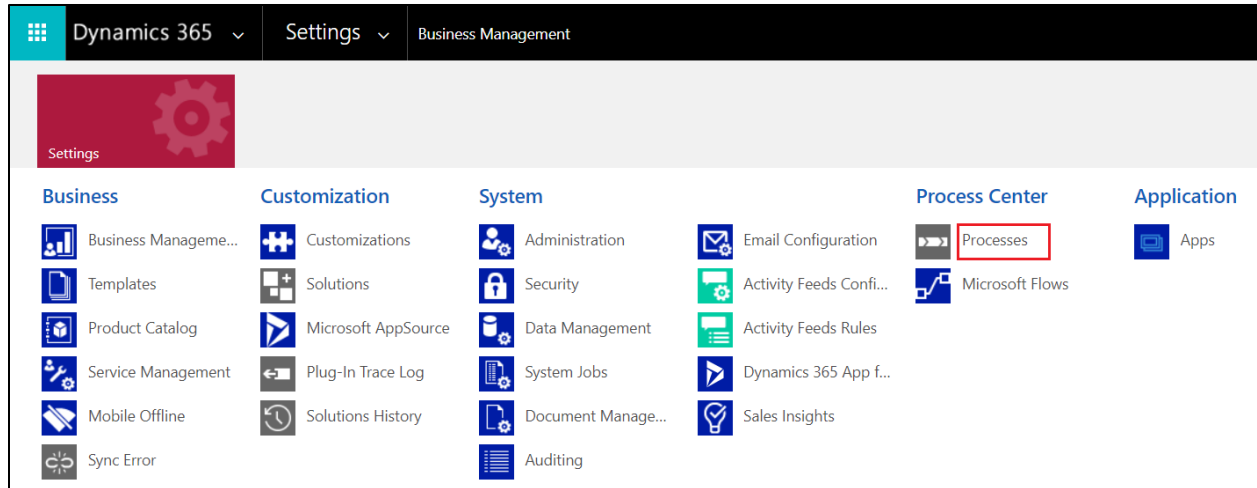
No data available.

### 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 data completeness 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	Owner
[Empty table body]		



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

General Administration Notes

**Hide Process Properties**

Process Name \*

Entity

Activate As

Category

**Available to Run**

☒ Run this workflow in the background (recommended)

☒ As an on-demand process

☐ As a child process

**Workflow Job Retention**

☐ Automatically delete completed workflow jobs (to save disk space)

**Options for Automatic Processes**

Scope

Start when:

☐ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change

☐ Record is deleted

**Add Step**   Select this row and click Add Step.

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

General Administration Notes

**Hide Process Properties**

Process Name \*

Entity

Activate As

Category

**Available to Run**

☒ Run this workflow in the background (recommended)

☒ As an on-demand process

☐ As a child process

**Workflow Job Retention**

☐ Automatically delete completed workflow jobs (to save disk space)

**Options for Automatic Processes**

Scope

Start when:

☐ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change

☐ Record is deleted

**Add Step**   Select this row and click Add Step.

IoT

Inogic.UserAdoption.TrackLogIn (1.0.0.0)

**Inogic.UserAdoption.Actions (1.0.0.0)**

Microsoft.Dynamics.ProjectService.Workflow ...

Microsoft.Dynamics.Service.Workflows.Entity...

Inogic.Alerts4Dynamics.WorkFlows (1.0.0.0)

Approvals.

Inogic.UserAdoption.Actions.CreateBulkDeletionJ...

**Inogic.UserAdoption.Actions.ExecuteDataComple...**

Inogic.UserAdoption.Actions.RetrieveAttributeM...

Inogic.UserAdoption.Actions.SendErrorLogEmail

- Click on Save and then activate the process.

## User Adoption Monitor - User Manual

Process: Contact - Datacompleteness

**Information**

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

**Common**

- Information
- Audit History
- Entities
- Entities
- Notify Workflow Failure
- User Adoption Entity ...
- Workflow Triggers
- Messages
- Messages
- Messages

**Process Sessions**

- Process Sessions

General Administration Notes

**Hide Process Properties**

Process Name \* Contact - Datacompleteness

Entity Contact

Category Workflow

Activate As Process

**Available to Run**

- ☒ Run this workflow in the background (recommended)
- ☒ As an on-demand process
- ☐ As a child process

**Workflow Job Retention**

- ☐ Automatically delete completed workflow jobs (to save disk space)

**Options for Automatic Processes**

Scope Organization

Start when:

- ☐ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☐ Record fields change
- ☐ Record is deleted

Add Step | Insert | Delete this step.

Type a step description here.

Inogic.UserAdoption.Actions (1.0.0.0):Inogic.UserAdoption.Actions.ExecuteDataCompleteness Set Properties

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

Abraham McCormick

Contact · Contact

Summary Details Scheduling Files Related

**CONTACT INFORMATION**

First Name \* Abraham

Last Name \* McCormick

Job Title ---

Account Name Fabrikam Robotics

Email abraham\_mccormick...

Business Phone 425-555-7700

**Timeline**

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

Geo Code

Share

Follow

Flow

Word Templates

Run Report

Assistance

Check back later to see what's new and stay up to date.

Company

Fabrikam Robotics

## User Adoption Monitor - User Manual

The screenshot shows the contact details for Abraham McCormick. The 'Run Workflow' menu is open, and 'Contact - Datacompleteness' is highlighted. The contact information includes:

CONTACT INFORMATION	
First Name	Abraham
Last Name	McCormick
Job Title	---
Account Name	Fabrikam Robotics
Email	abraham_mccormick...
Business Phone	425-555-7700

The timeline section shows a 'Get started' button and the text 'Capture and manage all records in your timeline.'

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

The screenshot shows the contact details for Abraham McCormick. The 'Completeness' field is highlighted with a red box. The contact information includes:

CONTACT INFORMATION	
First Name	Abraham
Last Name	McCormick
Job Title	---
Account Name	Fabrikam Robotics
Email	abraham_mccormick...
Business Phone	425-555-7700
Mobile Phone	---

The timeline section shows a 'Get started' button and the text 'Capture and manage all records in your timeline.'

## 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 ▾	⋮
<b>Active Tracking View ▾</b>									 Search this view 
✓ 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

Refresh Run Report Excel Templates

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

Look in

Search

	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/scripts/UserAdoption.CrmJS.js**

**Form Properties**  
Modify this form's properties.

**Look Up Record**  
Enter your search criteria.

**Look for** Web Resource

**Look in** WebResource Lookup View For Java Scri

**Search** ikl\_/UserAdoption/scripts/UserAdoption X

Name	Display Name ↑	Descrī
✓ ikl_/UserAdoption/scripts/UserAdoption.CrmJS.js	ikl_/UserAdoption...	

1 - 1 of 1 (1 selected) Page 1

New Add Cancel Remove Value

OK Cancel

➤ **ikl\_/UserAdoption/scripts/UserAdoption.WebAPI.js**



**Form Properties**  
Modify this form's properties.

**Look Up Record**  
Enter your search criteria.

**Look for** Web Resource

**Look in** WebResource Lookup View For Java Scri

**Search** ikl\_/UserAdoption/scripts/UserAdoption X

Name	Display Name ↑	Description ↻
✓ ikl_/UserAdoption/scripts/UserAdoption.WebAPI.js	ikl_/UserAdoptio...	

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

[New](#) [Add](#) [Cancel](#) [Remove Value](#)

[OK](#) [Cancel](#)

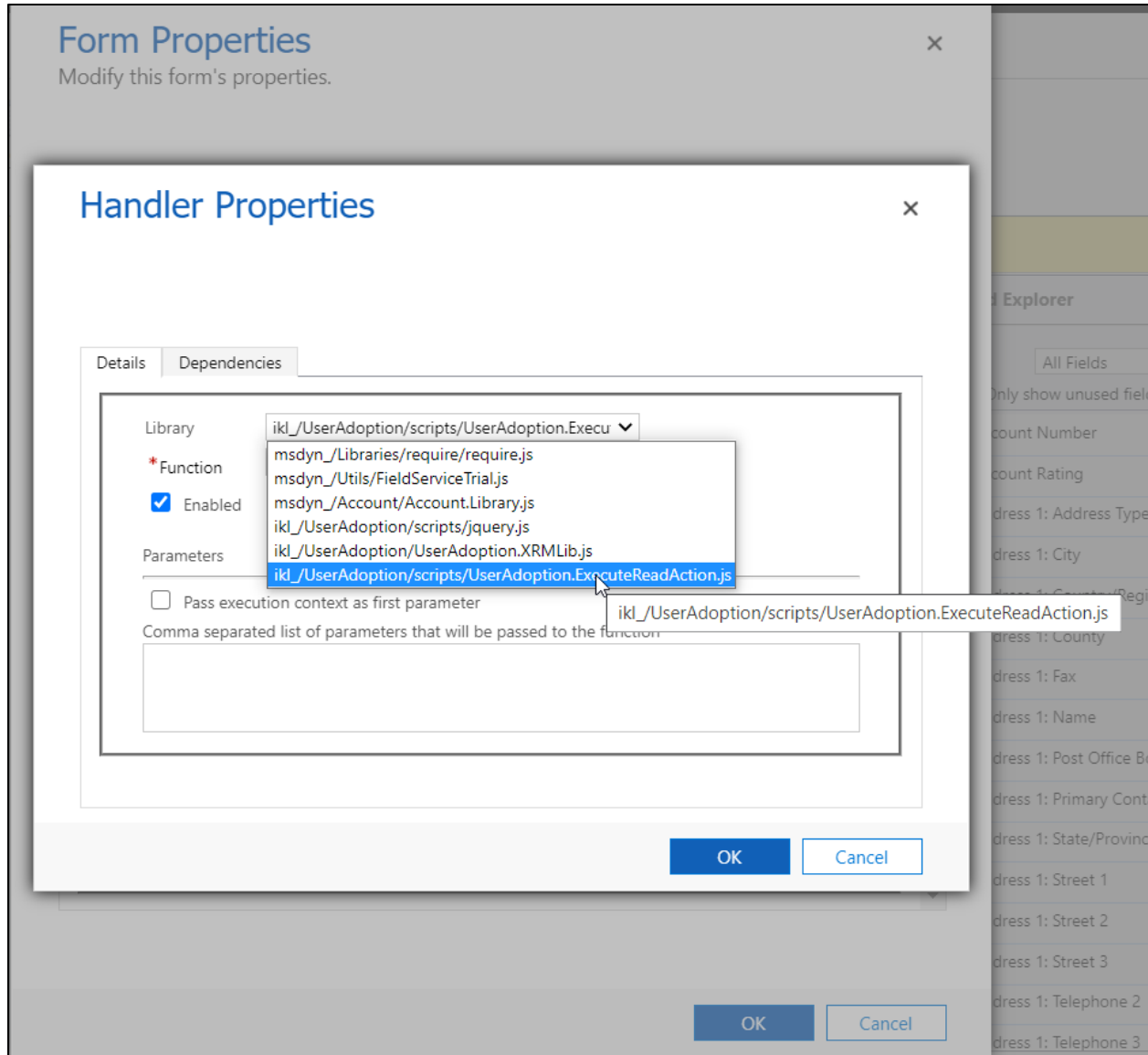
## Form Properties

Modify this form's properties.

The screenshot shows the 'Form Properties' dialog box with the 'Event List' tab selected. Under the 'Form Libraries' section, there is a list of libraries available for the form. The library 'ikl\_/UserAdoption/scripts/jquery.js' is highlighted with a red box.

Manage libraries 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...	

- 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 sub-dialog 'Handler Properties' open. The 'Form Properties' dialog has a title bar with a close button (X) and the text 'Form Properties' and 'Modify this form's properties.' The 'Handler Properties' dialog has a title bar with a close button (X) and the text 'Handler Properties'. It has two tabs: 'Details' (selected) and 'Dependencies'. The 'Details' tab contains the following fields:

- Library:** A dropdown menu showing 'ikl\_/UserAdoption/scripts/UserAdoption.Execu'.
- \*Function:** A text field containing 'getRecordDetails'.
- Enabled:** A checkbox that is checked, with the label 'Enabled'.
- Parameters:** A section with a checkbox labeled 'Pass execution context as first parameter' (unchecked) and a text area below it with the placeholder text 'Comma separated list of parameters that will be passed to the function'.

At the bottom of the 'Handler Properties' dialog are 'OK' and 'Cancel' buttons. At the bottom of the 'Form Properties' dialog are also 'OK' and 'Cancel' buttons.

Events | Display | Parameters | Non-Event Dependencies

Manage functions that will be available in the form.

+

 Add

✖

 Remove

↑

 Up

↓

 Down

✎

 Edit

msdyn\_/Libraries/require/require.jsmsdyn\_/Libraries/...
msdyn\_/Utils/FieldServiceTrial.jsFieldServiceTrial.js
msdyn\_/Account/Account.Library.jsAccount.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.

ControlForm
EventOnLoad

+

 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

User Adoption Tracking

Aggregate Configuration

Target Configuration

SYSTEM Owner

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

User Adoption Tracking

Aggregate Configuration

Target Configuration

SYSTEM Owner

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	Record URL	Access Date Time (for Login only)	Status Reason	Created On
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	<a href="https://mrogs1.crm.dynamics.com//main.aspx?etn=account&amp;pagetype=...">https://mrogs1.crm.dynamics.com//main.aspx?etn=account&amp;pagetype=...</a> 
Tracking Id	 <a href="#">Katie Lewis - Account - update</a>

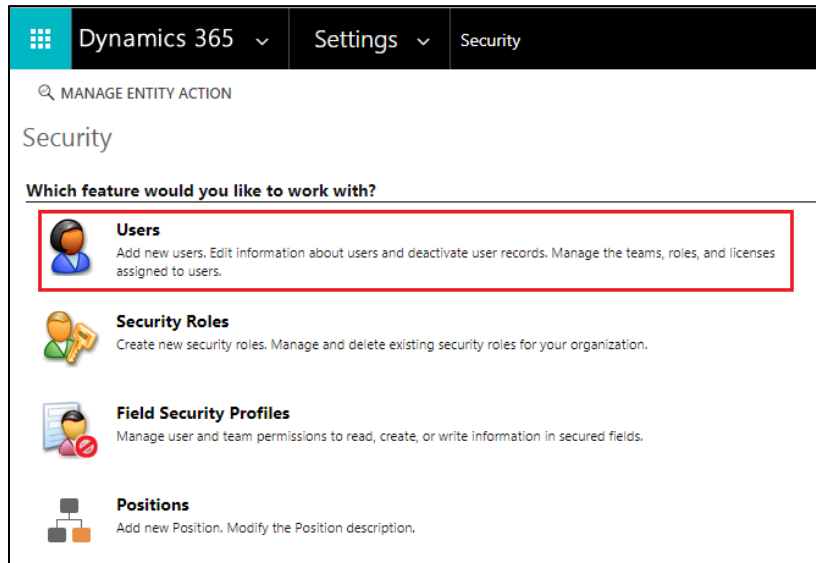
- **Record Guid:** Unique Id of the record on which the operation was performed.
- **Record URL:** Link to the record on which the operation was performed. You can click on the link to navigate to the record that is being tracked.



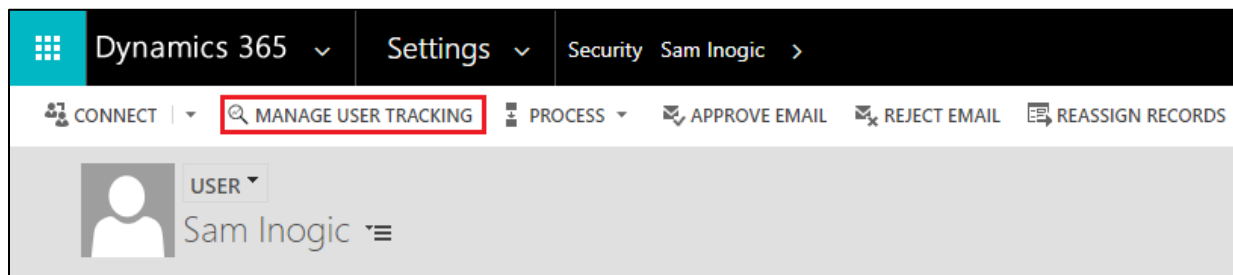
## Control User Level Tracking

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

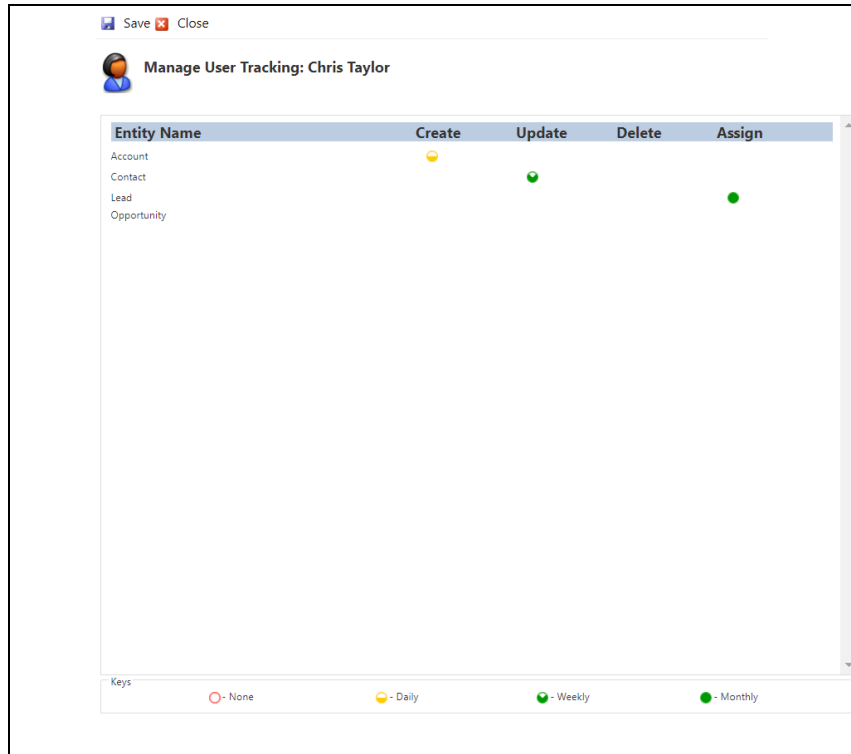
- Navigate to *Advanced Settings > Settings > Security > Users*.



- 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 .

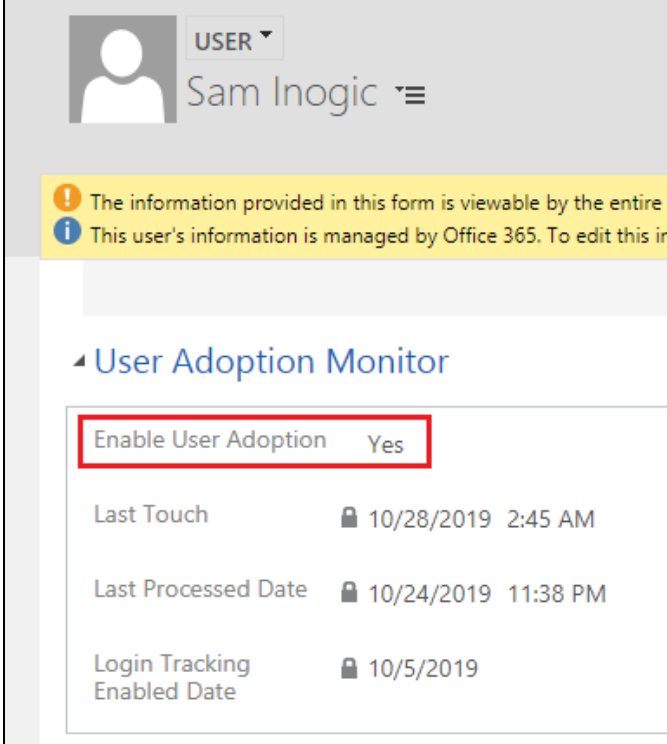
**Note:** Customizing tracking capability of a particular user will end the synchronization with the System Level configurations. This means if you customize a user's tracking capability, and later on, you enable tracking for an entity under Create action at System Level, then it will not take effect 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.

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## Control Tracking for a User Globally

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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.



The screenshot shows the 'User Adoption Monitor' section for a user named 'Sam Inogic'. At the top, there is a header with a user icon, a 'USER' dropdown, and the name 'Sam Inogic'. Below this is a yellow warning banner with two messages: 'The information provided in this form is viewable by the entire' and 'This user's information is managed by Office 365. To edit this in'. The 'User Adoption Monitor' section is expanded, showing a toggle for 'Enable User Adoption' set to 'Yes', which is highlighted with a red box. Below the toggle, there are three rows of data: 'Last Touch' with a lock icon and timestamp '10/28/2019 2:45 AM', 'Last Processed Date' with a lock icon and timestamp '10/24/2019 11:38 PM', and 'Login Tracking Enabled Date' with a lock icon and timestamp '10/5/2019'.

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

*Last Touch* would show the last date of any action for this user was tracked.

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## User Adoption Monitor Benefits

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- 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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