



# User Adoption Monitor

**inogic**

User Adoption Monitor

## User Adoption Monitor - White Paper

### Aim:

Enables managers to monitor the user actions performed across CRM and not with the intent of monitoring what exact data was entered by the user.

### Features:

- Monitor Dynamics CRM Users Actions
- Track OOB and Custom Entities Records
- Define Monitoring Period for Entities
- Define Users to be Monitored
- Define Entities and Associated Actions
- Track Usage: Daily, Weekly or Monthly
- Dashboard Reporting per Entity/ Action/ Period
- Dashboard Reporting per User/ Period
- User Adoption Report Creation
- Monitor Usage Without Disrupting On-going Activity
- Track user Log-in & Log-out details
- Track amount of time spent by the user on particular Entity records
- Track and monitor CRM access of users
- Track and monitor aggregate value of user actions related to a particular entity
- Track and monitor target value allotted to users
- Track and ensure the completeness of an entity record

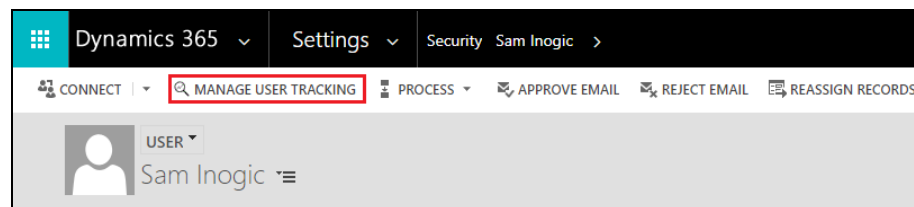
### Supported Versions

**Versions:** Dynamics 365 8.2 and above, Dataverse (Power Apps).

**Deployment Models:** On-Premise and Online.

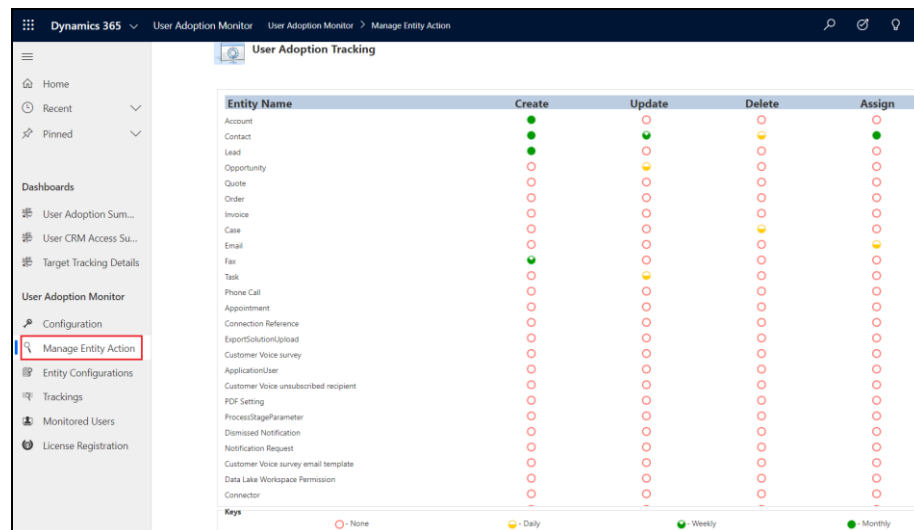
### Ease of Access:

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



### User Adoption User Interface:

User Adoption tracking settings can be configured from Manage Entity Action. Here the Managers can configure the entities and actions that need to be tracked/monitored. You choose the period based on which the results need to be summarized. The tracking can be set for daily, weekly or monthly basis.

A screenshot of the 'User Adoption Tracking' configuration interface. The interface shows a table with columns for 'Entity Name', 'Create', 'Update', 'Delete', and 'Assign'. Each cell in the table contains a colored circle indicating the tracking status: green for 'Create', yellow for 'Update', red for 'Delete', and blue for 'Assign'. The 'Entity Name' column lists various CRM entities like Account, Contact, Lead, Opportunity, Quote, Order, Invoice, Case, Email, Fax, Task, Phone Call, Appointment, Connection Reference, ExportSolution/Upload, Customer Voice survey, ApplicationUser, Customer Voice unsubscribed recipient, PDF Setting, ProcessStageParameter, Dismissed Notification, Notification Request, Customer Voice survey email template, Data Lake Workspace Permission, and Connector. A legend at the bottom indicates the colors: red for 'None', yellow for 'Daily', green for 'Weekly', and blue for 'Monthly'.

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

### Log In & Log Out

Track Log In & Log Out details of each user in Dynamics 365 CRM on daily basis.

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**Application-loginlogout**  
User Adoption Entity Configuration

General Related

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

Trackings

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

## Check-in & Check-out

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

**Case-checkincheckout**  
User Adoption Entity Configuration

General Related

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

Trackings

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

**Case-checkincheckout**  
User Adoption Entity Configuration

General Related

Trackings

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

## Aggregate Tracking

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

Dynamics 365 User Adoption Monitor User Adoption Monitor > Entity Configurations > Opportunity-win

Opportunity-win  
User Adoption Entity Configuration

General Related

Robredo Silva - Opportunity - win 2.00 Robredo Silva 7/24/2020 7/24/2020 7/24/2020 6:00 ...

Aggregate Trackings

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

## Target Tracking

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

Opportunity-win  
User Adoption Entity Configuration

General Related

Attribute	Aggregate Type	Created On	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 ...

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## Data Completeness

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

The screenshot shows a CRM contact record for Patrick Jane. The record is owned by Thomas Perry. The 'Complete' status is highlighted in a red box. The contact information includes: First Name: Patrick, Last Name: Jane, Job Title: ---, Account Name: ---, Email: patrick@gmail.com, Business Phone: 544545445, and Mobile Phone: ---. The record is categorized as a Contact.

## Monitor User Adoption:

Managers can configure the user actions in Dynamics CRM that need to be monitored by the tool. You can set rules specific to individual users to monitor as well.

The screenshot shows the 'Manage User Tracking' interface for Chris Taylor. It displays a table with columns for Entity Name, Create, Update, Delete, and Assign. The table lists the following entity types: Account, Contact, Lead, and Opportunity. The tracking status for each entity type is indicated by a colored dot: Account (None), Contact (Daily), Lead (Weekly), and Opportunity (Monthly). A legend at the bottom shows the keys for None, Daily, Weekly, and Monthly.

## Review results on Dashboard

The monitoring results are stored in easy to report formats. Quickly design charts and have it up on your dashboard.

The screenshot shows the 'User Adoption Summary' dashboard. It contains several charts and reports:

- User Associated View (This Month):** A bar chart showing the sum of counts for various entity labels (Account, Contact, Lead, Opportunity, Phone Call) across different users (John Inogic, Jerry Inogic, Kim Inogic, Jack Inogic, Sam Inogic).
- Phone-Call Associated View:** A bar chart showing the sum of counts for various entity labels across different days (10/3/2019, 10/4/2019, 10/7/2019, 10/11/2019, 10/14/2019).
- Active Trackings (This Week):** A pie chart showing the distribution of active trackings for Account, Contact, Email, Incident, and Phone Call.
- Active Trackings (This Month):** A bar chart showing the sum of counts for various entity labels across different users.
- Creates By Entity (This Month):** A bar chart showing the sum of counts for various entity labels (Account, Contact, Lead, Opportunity, Phone Call).
- Active Trackings (This Month) Monthly Activity Report By Action:** A pie chart showing the distribution of active trackings for Account, Contact, Email, Incident, and Phone Call.

## Contact Us:

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