



## User Adoption Monitor

# User Adoption Monitor - White Paper

## Aim:

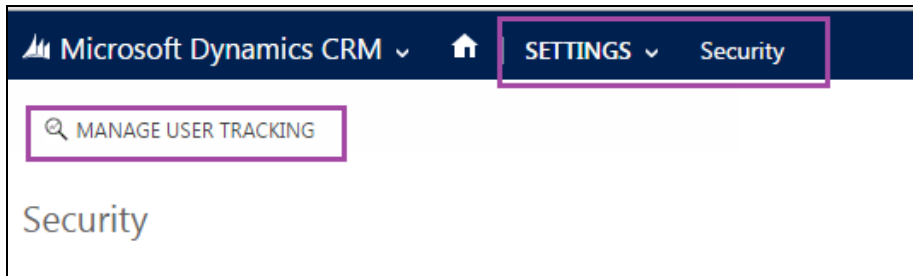
Enable managers to monitor the actions of team members with respect to using Dynamics CRM for their day to day operation and not with the intent of monitoring what exact data was entered by the user

## 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 and monitor CRM access of Users
- 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

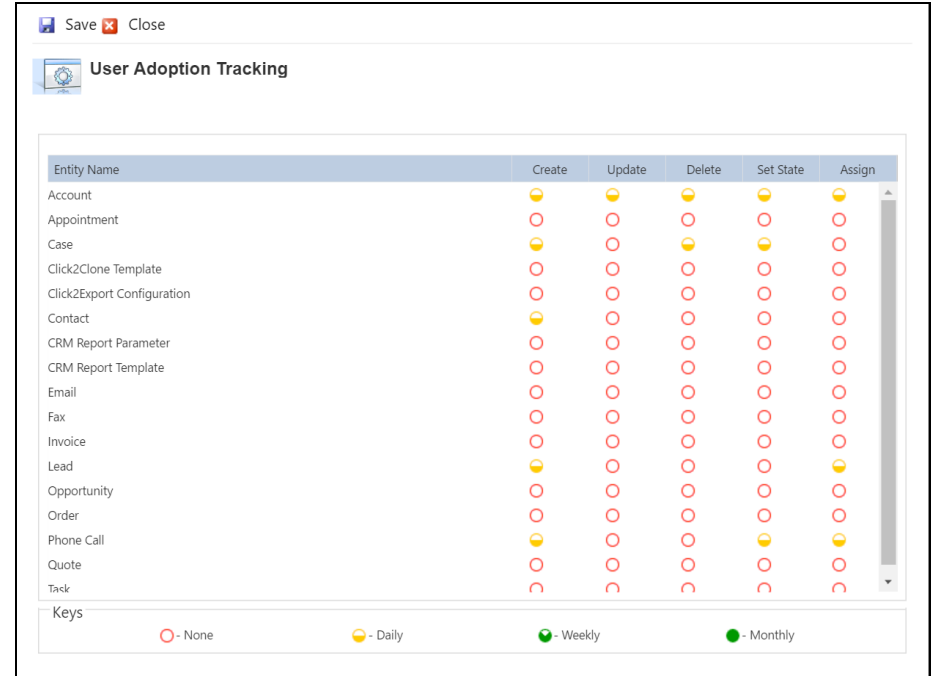
## Ease of Access:

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



## User Adoption User Interface:

User Adoption tracking settings can be done from Security. Here the Managers can configure the entities and operation that need to be 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.



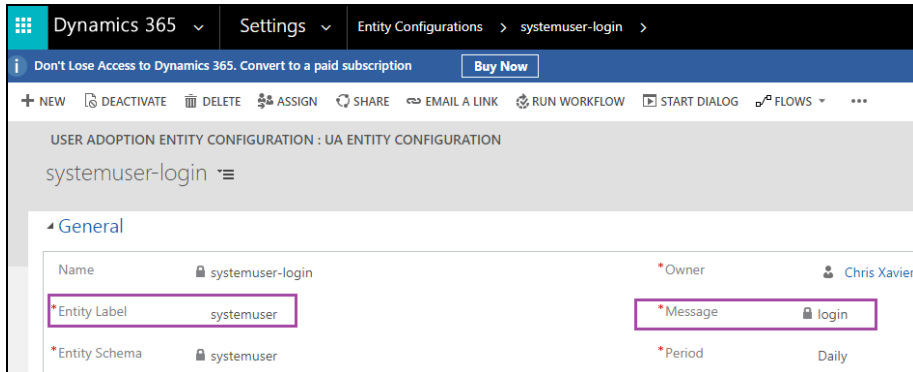
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## CRM Access Tracking

It is a feature to track the CRM access of a user whenever they access the CRM manually. It enables the managers to monitor the CRM access of their team members by the various web activities performed. To achieve this functionality you need to enable the auditing first.

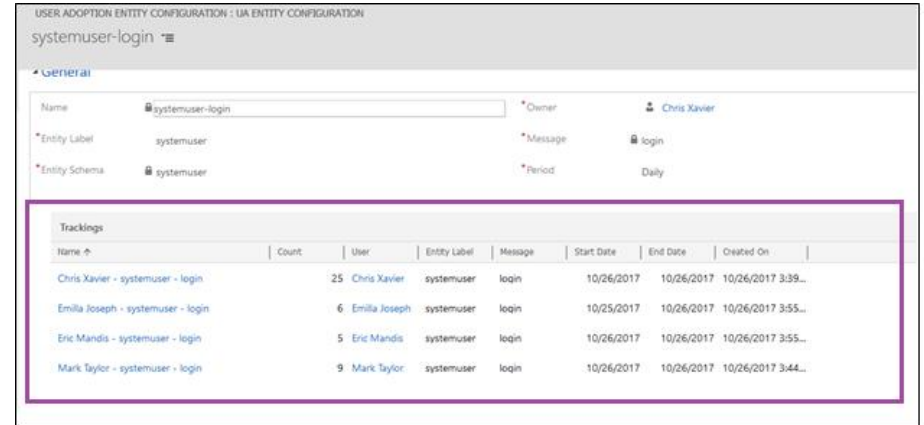
## Configure Access Tracking

CRM Access tracking can be enabled by creating an entity configuration record with Entity Label and Entity Schema as “systemuser”, Message as “login” and Period “Daily” as shown below.



## CRM Access User Interface

Once the Entity Configuration is created, the User Adoption Monitor will track the CRM Access of each enabled and logged in user which can be reviewed by opening “systemuser-login” entity configuration record.



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## 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.

Save Close

**Manage User Tracking: John Inogic**

Entity Name	Create	Update	Delete	Set St..	Assign
Account					
Case					
Contact					
Lead					
Phone Call					

Keys

- None
- Daily
- Weekly
- 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.

User Adoption Summary

Count: 1

5/20/2016  
Day (Created On)

Sam Inogic

Count: 1

Week 21 of 2016  
Week (Created On)

Sam Inogic

Count: 1

May 2016  
Month (Created On)

Sam Inogic

Summary by User

Active Trackings(This Month)

User	Sum (Count)
Sam Inogic	31
Lead	2
Phone Call	2

Creates By Entity(This Month)

Creates By Entity(This Month)

Entity Label	Sum (Count)
Account	5
Phone Call	1

Counts by Actions(This Month)

Active Trackings(This Month)

Action	Count
assign	9
create	7
***	4
...	6

Users who accessed CRM today

Search for records

- Full Name (Use...)
- Job Title (User...)
- Chris Xavier
- Mark Taylor
- Emilla Joseph
- Eric Mandis

CRM accessed by Users in this week

CRM accessed by Users in this week

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

Number of times CRM accessed by Users today

Users who accessed CRM today

User	Sum (Count)
Emilla Joseph	6
Mark Taylor	9
Eric Mandis	5
Chris Xavier	25

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### Contact Us:

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