



User Adoption Monitor

User Adoption Monitor - White Paper

Aim:

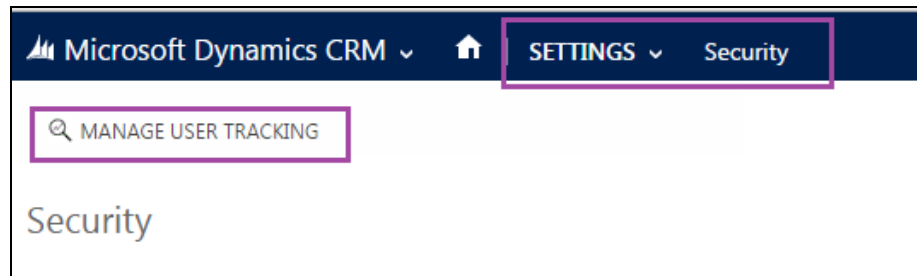
Enable managers to monitor the actions of team members with respect to using Dynamics CRM for their day to day operation and not with the intent of monitoring what exact data was entered by the user

Features:

- Define Entities and their related actions that need to be monitored
- Define users that need to be monitored
- Ability to define the monitoring period system-wide
- Dashboard Reporting per user/ period
- Dashboard Reporting per Entity/ Action/ Period
- User Adoption Report - Tabular representation of the counts per user in a matrix

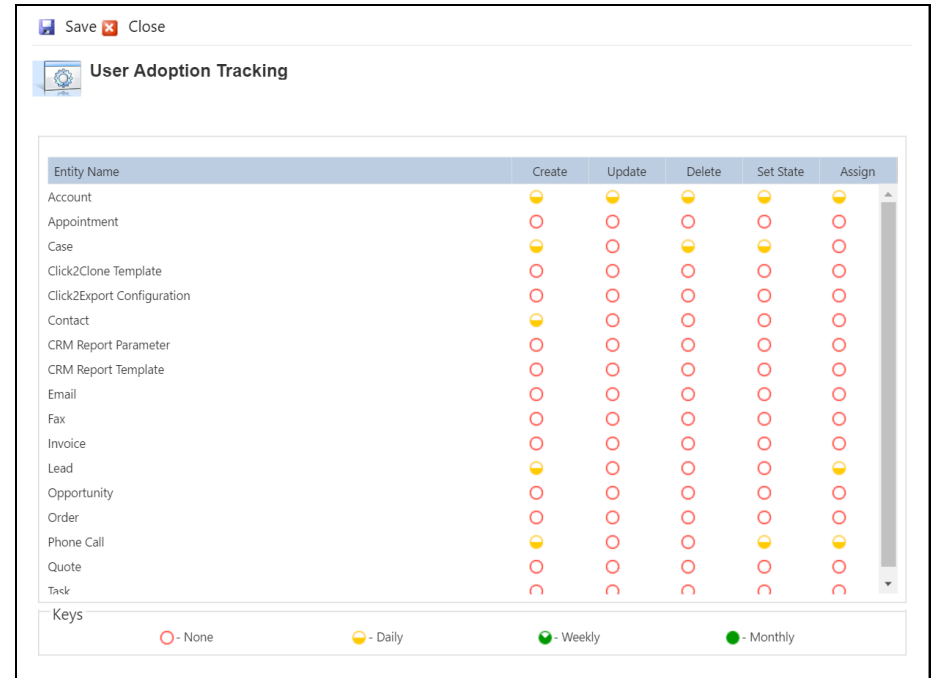
Ease of Access:

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.



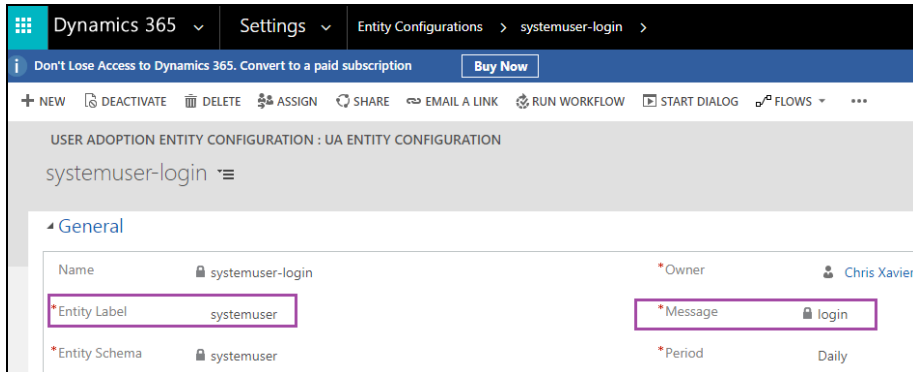
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CRM Access Tracking

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.

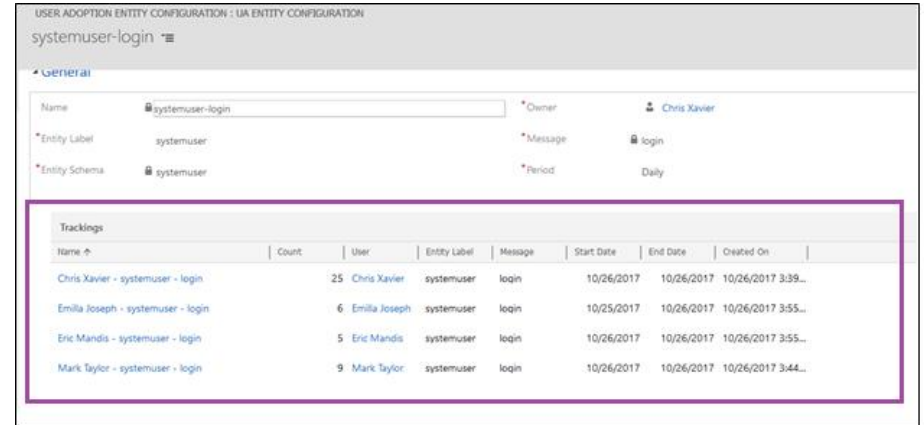
Configure Access Tracking

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

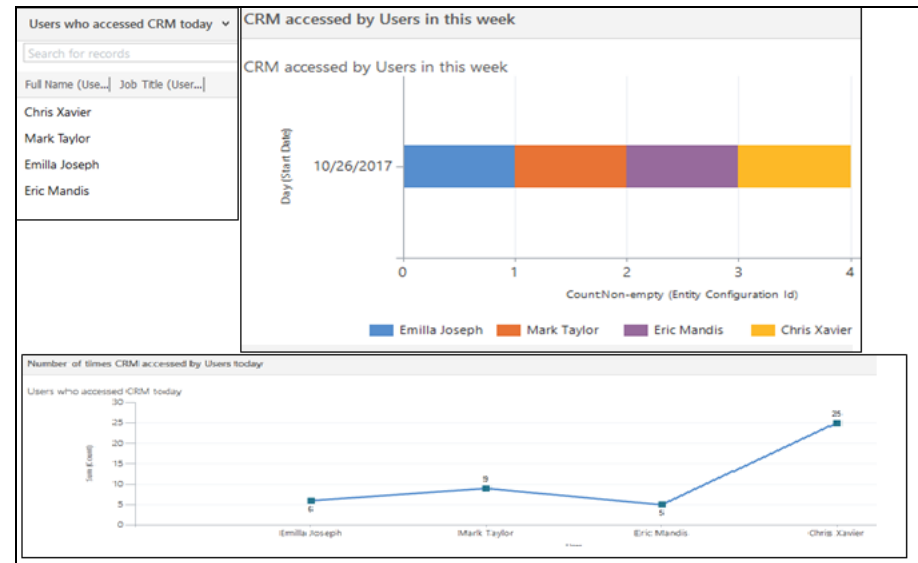
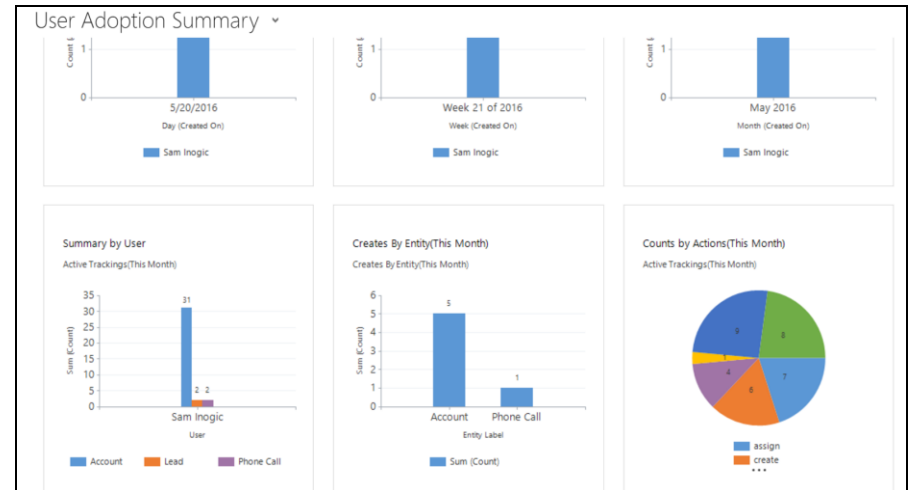
Entity Name	Create	Update	Delete	Set St..	Assign
Account					
Case					
Contact					
Lead					
Phone Call					

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.



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