

Export to Excel Tracker



Set up and user guide



Prepared for

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1. Version

1.1. Change Record

Date	Author	Version	Solution Version	
08/02/2023	lain Wicks	0.1	1_0_0_20	
18/06/2023	lain Wicks	1.1	Client Ready	
12/09/2024	lain Wicks	1.2	Updated for export entities	



2. Installation

2.1. Import the Solution

Once you have downloaded the solution file (which is a zip file) you are ready to go. Don't worry for now about the serial key we will send you an email with that.

The first thing we need to do is to import the solution. You will need to be a CRM administrator to do that. If you are not an administrator send this document and the solution file to your CRM administrator to carry out the below.

- 1. Save the zipped solution file to a temporary location and make a note of where you have put it. You **do not** need to unzip the file.
- 2. Log in to your CRM system
- 3. Open a new tab and type in <u>https://make.powerapps.com</u>. This will open the Power Apps Maker Portal.
- 4. This next bit is **important**. You need to be in the right environment. You can check which environment you are in easily. Look in the top right corner of the screen. Here you will see the name of the environment you are currently in. You need to be in the same environment as the Organisation ID that you gave us.

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If you need to change the environment click on the name in the top right and select the correct one from the drop down list.

5. Once you are in the right environment, navigate to Solutions (in the navigation pane on the left side) See below:

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Dataverse	\sim	
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🕏 Chatbots	\sim	
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Cards (preview)	\sim	
Solutions		



6. Click on the Import Solution button at the top of the screen

	Power Apps					
=		+ New solution	← Import solution	Dpen AppSource	Publish all customizations	

7. Click the Browse button and locate the zipped solution file.

Import a	Import a solution							
Environment Rocket CRM								
Select a file Browse for the	e solution file to import.							
Browse	ExportToExcel_1_0_0_17_managed.zip							

- 8. Click **Next.** This will upload the file to Power Apps and do some checks to make sure the file is valid.
- 9. On the next screen, click Advanced Settings and ensure that Enable Pllugin steps and flos included in the solution is ticked also.



10. Then click Import.

Import a solution Environment Reviewment Reviewment Reviewment ExportToExcel Type Managed Publisher Rocket CRM Version 1.0.0.17 Patch No Advanced settings Advanced settings Cancel Import Cancel Cancel	
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11. The import process can take a few minutes.



12. Be patient...it will let you know when it's completed.

+ New solution	← Import s	solution	Dpen AppSource	Publish all customizations	
Solution "Rocket Exp	ort to Excel Trac	cker" impo	rted successfully.		
Solutions Pul	blishers H	listory			

13. Now, just to finish off the installation of the solution file, you'll need to publish the changes to the system. So, just go ahead and click on the **Publish all Customisations** button. It might take a minute or two to publish the changes.



14. Now you can move onto the next section: Assigning Security Roles



3. Assigning Security Roles to give your admin team access to the logs.

Anyone who needs to be able to access the Rocket CRM Export to Excel Tracker, will need to have one of the the following two security roles:

• Rocket Export to Excel Tracker – App Access

This Role gives full access to the App and to the logs and includes delete permissions. Anyone with this role can delete the export logs.

• Rocket Export to Excel Tracker - ReadOnly Access

This Role gives full access to the App and to the logs but does not include delete permissions. Anyone with this role cannot delete the export logs.

Note 1: Anyone with the System Administrator security role will automatically have access to the App and to the logs BUT will not have access to the Dashboard. To get the best use of the App, *System Administrators should also assign themselves the Rocket Export to Excel Tracker – App Access role.*

Note 2: You do not need to assign security roles to All Users, only to those that need to be able to see the Export Logs.

The instructions below explain how to give one of the security roles to a user or yourself.



3.1. Assigning a security role to a user

- 1. Open the Power Platform Admin centre: To do this, navigate to: <u>https://admin.powerplatform.microsoft.com/home</u>
- 2. Select your environment once again and click on Settings



3. Then, expand Users + Permissions, then click on Users

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\checkmark $ riangle$ Business	
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A Ra Users + permissions	
Application users	
Business units 🖆	
Column security profiles	
Hierarchy security 🖆	
License to role mapping	
Mobile configuration	
Positions 🗅	
Security roles	
Teams	
Users	
✓	
Audit settings, Audit summary view, Entity and field audit settings, System jobs	
✓ ■ Templates	
Access team templates, Article templates, Contract templates, Data import templates	
✓ じ Updates	
App update settings (Preview)	

4. Select the user that you want to give permission to view the application. This will open up a side pane. Click on Manage Roles



Keith Floyd	d
A Run diagnostics	s 🖔 Refresh user \cdots
User Name	
Keith@rocketcrm.co.uk	
Roles	Teams
Sample Role	org52e097d0
Delegate	Manage teams
Basic User	
Managa rolos	
Contact Information	
First Name	Last Name
Keith	Floyd
Primary email	Phone number
Keith@rocketcrm.co.uk	
Mobile phone	
Organization Information	Manager
Business Unit: org52e097d0	None provided
Change business unit	Change Manager
	Reassign records
Position	Administration
None provided	Read-Write
Change position	Client Access License (CAL) Information

5. Look for and tick the security role Rocket Export to Excel Tracker – App Access



Rocket Export to Excel Tracker - App Access

6. Then click the **Save** button to confirm the changes and then close the pane.



4. Adding the Product Serial Key

- 15. Now, in order to complete your installation, you'll need to add your unique product serial number to the app. You should have received this by email.
- 16. Open the new app from the app selector menu. In order to see the new app, you may need to press F5 to refresh your screen. If F5 doesn't work, try Ctrl + F5.

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Provides access to the full suite of capabilities, including administration	Rocket Export to Excel Tracker		Solution Health Hub enables rules- based validation on the health of
Microsoft Dynamics 365	Rocket CRM	Default Publisher for org52e097d0	Dynamics 365
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17. Once you are in the app, click on **Configuration** in the navigation pane on the left hand side and then click the **New** button.

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68	Export to Excel Log	5						

18. In the New Configuration window that opens, paste in the unique Product Serial key that was sent to you by the team at Rocket CRM. You should see that the Organisation ID field is automatically populated (as in the screenshot below)





5. Choose which tables you want to track the exports for

Next, you must choose which tables you want to track the export of (this can be up to 50 tables).

You need to type in the Schema name of the entities that you want to track the export of in the **Export Entities** field.

VERY IMPORTANT: It is important that you use the scheme name only and the entries must be separated by a comma and with no spaces in between.

Example: contact,lead,account,rocket_product,incident

5.1. How to find the schema name of a table:

By default you might be tempted to just type in contacts, Accounts, Opportunities, cases etc but this won't work as these are the display names of the tables.

Here are the steps to find the schema name of a table:

- 1. Open a new tab and type in <u>https://make.powerapps.com</u>. This will open the Power Apps Maker Portal. If you need to change the environment click on the name in the top right and select the correct one from the drop down list.
- 2. Once you are in the right environment, navigate to Tables in the navigation pane on the left side.
- 3. You wull see the list of CRM tables appearing on the right. The **Name** column is the schema name. see below:

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7	Power Platform	Account Product	rocket_accountpro	duct
		Address :	customeraddress	
		Appointment	appointment	
		Attachment :	activitymimeattach	ment

To save the configuration, click on the Save button.



6. Rocket CRM Export to Exel Tracker

6.1. When is a log created

You are now ready to start viewing logs. Everytime someone exports data in the following scenarios a log will be created.

- Someone clicks
 - o The Export to Excel button
 - Open in Excel online (this scenario will actually create two logs because the system makes two calls to the API)
 - o Static Worksheet
 - o Static Worksheet (Page Only)
 - o Dynamic Worksheet
 - o Dynamic PivotTable

Note: in the case of the Dynamic Worksheet or Dynamic PivotTable, a log will also be created each time the data is refreshed in the Dynamic spreadsheet.

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6.2. Viewing a Log

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Inside the Export to Excel Tracker open a log to see the details.

Some of the information available from the Export to Excel log includes:

- Exported User: The user who initiated the export.
- Date and Time of Export.
- Total No of Records.
- Columns Exported.
- Entity Display Name: The name of the entity/table that was exported.
- Message Name: this will tell you the type of export.
 - o ExportDynamicsToExcel: This is a Dynamic Worksheet of PivotTable.
 - ExportToExcel: This is a standard data export from the button or export menu.
 - o ExportToExcelOnline: This shows when a user exports data to Excel Online.
- View Type: Whether system view or personal view was exported.
- Fetch XML: This is the criteria of the records that ere exported.



7. Export Analysis Dashboard

The Dashboard will show the trends such as who carrying out the most exports, the type of exports and what are the tables being exported.





8. Troubleshooting

If you find that you are getting an error in the logs and they have stopped capturing information, your subscription may have expired or there maybe a problem authenticating your license. In either case please reach out to the Rocket CRM team at support@rocketcrm.co.uk for advice.

🛆 Error Log

Process failed due to deactivated/expired subscription key.