

# Reporting for Dynamics 365 Customer Engagement

Course Level: 200

This class reviews the unique CRM reporting capabilities of Advanced Find views, customizing charts with XML, the built-in report wizard, & custom SSRS reports using FetchXML and the Report Authoring Add-in. The report author creates stunning visualizations & analysis through interactive reports. Learners leave with all the knowledge and resources to create powerful analytics from Dynamics 365. Note: some content applies exclusively to Online and On-premise. The instructor will indicate those differences in class.



# At A Glance: Reporting in Dynamics 365 Customer Engagement

## Why Enroll?

Gain a wholistic understanding of out-of-the-box advanced reporting functionality. Learn to use multiple tools important to analytics.



## Who to Enroll?

System Administrators -  
Power Users -  
Customizers -  
Developers interested in –  
Reporting



## Key Takeaways

Data Analysis & Visualization;  
Customizing Charts with XML; Report  
Manager; SSRS Report Building  
Toolset; Build SSRS Report with SSDT.



## Register

Register for Reporting for  
Dynamics 365 Customer  
Engagement today!

[Click to Register.](#)

# About this Training



## Intended Audience

This training is intended for Dynamics 365 users with intermediate to advanced technical skills who desire to continue their education in business analytics. This course assumes working knowledge of skills outlined in the CRM Boot Camp for Dynamics 365 course. Experience with relational database concepts and Microsoft SQL is helpful but not required.



## Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Completion of CRM Boot Camp for Dynamics 365 or equivalent application experience
- Technical Understanding of Dynamics 365

## Technical Requirements

- Computer with Microsoft Remote Desktop Connection installed and configured to allow connection to a remote computer -or-
- Computer with SQL Server Data Tools for Visual Studio 2015



# Key Takeaways

## This Training Will Provide:

- A deeper understanding of the data analysis and visualization tools available in the Dynamics 365 user interface
- Skills for creating Excel and Word Templates
- Tools and skills for customizing Dynamics 365 charts using XML
- An understanding of SSRS and Power BI as external analysis and design frameworks which allow surfacing of business intelligence in the dynamics 365 user interface
- Basic skills for authoring SSRS reports using Visual Studio SQL Server Data Tools (the course will focus on using Fetch XML as a data source, as this works for both Online and on-premises implementations, and will include information on a few SQL data source specific functions)



DAY 1



DAY 2



## DATA ANALYSIS AND VISUALIZATION

- Reporting Infrastructure
- Reporting in the User Interface (UI)
- SQL Server Reporting Services (SSRS) Reports
  - Default Reports
  - Report Wizard Reports
  - Custom SSRS reports using SQL or Fetch XML data connections
- Compare and contrast capabilities of UI and SSRS

## REPORTING IN THE USER INTERFACE

- Advanced Find
  - Data Filters
  - Sorting
  - 1:1 Relational Data
- Document Generation
  - Security Considerations
  - Word Templates
    - Understanding Relationships
    - XML Document Controls
  - Excel Templates
    - Designing Visualizations
    - Refreshing Data

- Charts
  - Leveraging Inline or via Dashboards
  - Built-in drill through to view data
  - Edit Chart XML
- Dashboards
  - Configuration options for Views and Charts
  - Using iFrames and Web Resources

## REPORT MANAGER

- Report Permissions
- Load a Report
- Edit report information
  - Display and categorize
  - Associate to an entity
  - Set Parent
  - Set as Individual or Organization
  - Change Ownership



DAY 1

DAY 2

## REPORT WIZARD

- Report Wizard
  - Capabilities and Consideration Filters
  - Groupings
  - Charts and Tables
  - Set the Default Filter

## SSRS REPORT BUILDING TOOLSET

- SQL Server Data Tools (SSDT) for Visual Studio
  - Using Report Projects
  - Set up SSDT Visual Studio 2015 Report Design Environment
  - Connecting to Dynamics 365 data security overview and requirements
- Data source best practices
  - Fetch XML data connections
  - SQL data connections

### • SSDT Report Design

- Connecting to Data Sources and Datasets
- Table, Matrix, Chart and Image tools
- Properties window and actions
- Formatting and expressions
- CRM Pre-Filtering
- Parameters
  - Report Filter Parameters
  - Report Formatting Parameters
  - CRM Specific Parameters

### • SSDT Report Design (continued)

- Parent Reports and Sub-reports
- Map Report capability (only available with SQL connections)
- Sparkline, Data Bar, Gauge and Indicator tools
- Publishing Custom SSRS Reports in CRM
  - Managing Report Definition Language files
  - Loading and Downloading
  - Solutions Portability
  - Report Settings

*Agenda is tentative and subject to changes based upon learner comprehension, instructor's discretion, and other factors. Order, pace, content, and timeline subject to change.*

©2018 PowerObjects, An HCL Technologies Company. All rights reserved. Unauthorized use prohibited.

# DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED