Reporting in Microsoft Dynamics CRM 2011

Duration: 1 Days       Course Code: M80445

Overview:
This one-day instructor-led course, Reporting in Microsoft Dynamics CRM 2011, provides students the information to better understand reporting methods along with more advanced reporting features of Microsoft Dynamics CRM 2011.

Target Audience:
This course is intended for Microsoft Dynamics CRM System IT Professionals. The course will also introduce topics and functionality important for developers, but will not cover these topics in depth.

Objectives:
- Understand basic reporting functionality available in Microsoft Dynamics CRM 2011
- Gain familiarity with common reports available in Microsoft Dynamics CRM 2011
- Understand various methods to create and modify charts in Microsoft Dynamics CRM 2011
- Develop basic understanding of SRS as it pertains to Microsoft Dynamics CRM 2011

Prerequisites:
Before attending this course, students must have: Experience using Microsoft Dynamics CRM 4.0 or Microsoft Dynamics CRM 2011.
Content:

Module 1: Introduction to reporting tools in Microsoft Dynamics CRM

There are many reasons for reporting in Microsoft Dynamics CRM

- Useful Background Knowledge and Skills
- Reporting Development Studio
- Reporting Tools and Possibilities
- Test Your Knowledge
- Solutions

The objectives are:
- Discuss the background knowledge that is helpful or necessary to create reports for Microsoft Dynamics CRM 2011.
- Explain the purpose of the primary report development environments used to create and deploy reports within Microsoft Dynamics CRM 2011.
- Outline the specific tools used to create and modify reports.
- Examine how dashboards can incorporate charts and reports.

Module 2: Visualisation

Here are many ways to view, understand and place data into perspective when it is compared with other data. Reports are used to view and record the details, and charts are used by consumers of the data to quickly view a snapshot of the information.

- Resources
  - Creating Basic Charts
  - Exporting Charts
  - Importing Charts
  - Modifying and Exporting Chart XML

The objectives are:
- Explain how basic charting concepts translate to Microsoft Dynamics CRM 2011 chart design.
- Identify resources available for creating basic and complex charts.
- Demonstrate the use of the Chart Designer window.
- Explain the proper use of each of the default chart types.
- Demonstrate and explain the steps to export the chart XML for a particular chart.
- Demonstrate and explain the steps to import the chart XML for a particular chart.
- Explain the XML chart schema.
- Explain and demonstrate how to modify the chart XML.

Module 3: Introduction to reporting basics

Microsoft Dynamics CRM includes a number of reports that provide useful business information. These reports are based on Microsoft SQL Server Reporting Services, and provide many of the same set of features that are available for the Microsoft SQL Server Reporting Services reports.

- Report Development Process
- Types of Reports in Microsoft Dynamics CRM 2011
- Default Reports
- The Report Wizard

The objectives are:
- Explain the report development process.
- Explain how SQL based and FetchXML based reports are used.
- Describe the default reports included in a new installation of Microsoft Dynamics CRM.
- Create reports using the Report Wizard.
- Describe the tools used to modify and create a report outside of Microsoft Dynamics CRM 2011.
- Describe the process for exporting and importing .rdl files.

Module 4: Business Intelligence
development studio and SQL reports

Business Intelligence Development Studio (BIDS) is the primary tool used to create or modify SQL Server Reporting Services (SSRS) reports. The end result of an SSRS report is an .rdl file that contains the report definition imported into Microsoft Dynamics CRM to view reports.

- Background Knowledge Required and Available Resources
- Filtered Views
- Creating a Basic SSRS Report
- SSRS Data Regions
- Parameters
- Pre-Filtering

The objectives are:
- Describe the type of background and experience needed to modify and create SQL based reports through Business Intelligence Development Studio (BIDS).
- Explain the use of Filtered Views.
- Describe the benefits of Filtered Views.
- Demonstrate the use of Filtered Views.
- Understand how to create a Microsoft SQL Server Reporting Services (SSRS) project within Visual Studio 2008.
- Demonstrate how to create a database connection.
- Explain how to define a data set.
- Explore how to format a report.
- Explain how to add groupings to an SSRS report.

Module 5: Fetch-based reporting

Creating FetchXML-based reports is similar to creating SQL-based reports. Data regions, data visualizations, and report formatting are applicable to FetchXML-based reports regardless of the querying technique.

- What is FetchXML?
- Authoring of Fetch-Based Custom Reports
- Introduction of FetchXML
- Introduction of Expressions and Collections

The objectives are:
- Examine what FetchXML is and how it is used to create FetchXML-Based reports.
- Understand the options available for authoring reports in Microsoft Dynamics CRM.
- Examine the FetchXML schema and how to use it.
- Implement the use of parameters within FetchXML queries
- Implement pre-filtering using FetchXML.
- Create queries that emulate UNION's.
- Create reports that implement multiple FetchXML datasets and parameters.
- Examine and understand simple expressions and queries used within SSRS reports.
Demonstrate how to use the BIDS Report Wizard.
Explain and demonstrate the use of different data regions.
Describe how charts and gauges can be used to provide visualizations of data.
Review the use of Geospatial Visualizations.
Explain the different types of report parameters available.
Explain how parameters are used.
Explain how pre-filtering is used within Microsoft Dynamics CRM reporting.

Additional Information:
This course will be delivered with digital courseware. In order to have the best learning experience you are asked to bring your own second screen to view the courseware. A second screen includes: tablets and laptops.

Further Information:
For More information, or to book your course, please call us on 0800/84.009
info@globalknowledge.be
www.globalknowledge.be