

Reporting in Dynamics 365

Module 01: Visualizations and Dashboards in Microsoft Dynamics CRM

Module Overview

Background Knowledge

Chart Making Procedure

Define the Message

Comparing Data

Showing Distribution

Parts of a Whole

Trend Over Time

Trend Over Time

Deviation

Preparing the Data

Import / Export Charts

Demonstration: Creating a basic Chart

Module Review

Module 02: XML Customizations in Charts

Module Overview

Exporting Charts

Understanding chart XML schema

Element Definition and Properties

Creating Charts

Module Review

Module 03: Introduction to Reporting in Microsoft Dynamics CRM

Module Overview

Using Microsoft Dynamics CRM Report Wizard

Types of Reports

Creating a Tabular Report

Demonstration: Reports and Charts

Demonstration: Wizard Report

Power BI Component - PowerQuery

Demonstration: Demo: OData Connection, PowerQuery, and Microsoft Dynamics CRM

PowerQuery and Microsoft Dynamics CRM Scenarios

Microsoft Dynamics CRM Online, PowerView, and PowerQuery

Power BI Component – PowerMap

Power Map Layer

Data Mashup with non-CRM Data

Demonstration: Power Pivot and Microsoft Dynamics CRM Online

Demonstration: Using PowerView and Microsoft Dynamics CRM

Demonstration: Using PowerMap, Layers, and Microsoft Dynamics CRM

Module Review

Module 04: Business Intelligence Development Studio and Fetch Based Reports

Module Overview

BIDS and Fetch based reports

Aggregate

Count Column
Pre-filtering with FetchXML
Designing Reports using FetchXML
Demonstration: Designing a Basic FetchXML Report in BIDS
Parameter Types
Demonstration: Using Parameters in a FetchXML Report
Expressions and Collections
Demonstration: Using Expressions in FetchXML Based Report Design
FetchXML Reports and Sub-Reports
Demonstration: Using Sub-Reports in FetchXML Based Report Design
Other Reporting Scenarios
Module Review