

Microsoft Dynamics CRM 2011 Reporting

Damian Sinay

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Everything you need to know to work with reports in Dynamics
CRM 2011

Damian Sinay

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Damian Sinay : Microsoft Dynamics CRM 2011 Reporting before purchasing it in order to gage whether or not it would be worth my time, and all praised Microsoft Dynamics CRM 2011 Reporting:

0 of 0 people found the following review helpful. Want to become a Microsoft CRM 2011 reporting ninja?By Todd SheltonThere's a real problem with Microsoft CRM report writing--there are a lot of ways to do it (with some combinations that just don't work), and until now we were stuck grinding through help files and obscure MSDN posts when all we want is a nice tight report that helps normal people understand their business.Well, you can thank Damian Sinay because he has written an excellent book that pulls together just about every way there is to write and deploy reports in CRM 2011. From the Report Wizard, to writing RDL in Visual Studio using FetchXML, to ASP.NET web pages that expose CRM reports in real time on regular web sites--if you're serious about developing and deploying Microsoft CRM 2011 reports, you need this book.Microsoft Dynamics CRM 2011 Reporting starts us off with the Report Wizard. Then we go into SQL Reporting Services, which is the back end reporting system for MSCRM on-premise and online.From there it's download-RDL-from-CRM-into-Visual-Studio and all of a sudden you have genuine, professional reports that have exactly the data you want and look exactly the way you want.One caveat: All

the SQL Server stuff (mostly programming against the SRS instance that backs CRM) is not available if you use CRM Online because in CRM Online Microsoft doesn't expose the direct access to SRS or the SQL database that you need to make that work. Don't worry, though because Damian brings it with the most thorough development of FetchXML (works on-premise, online and from inside the CRM client) I've ever seen in one place. Here's just one example: a step-by-step on how to get FetchXML Intellisense going in Visual Studio. Seriously? CRM and Intellisense? Yes! Speaking of, the wizard doesn't give you much control of the layout--for that you need Visual Studio, and Damian steps us through exactly how to get a wizard-generated RDL file into Visual Studio where we can bend that report precisely to our will. Since this method works for CRM on-premise and CRM Online, if you're serious about learning portable MSCRM reporting skills--learn FetchXML and use the RDL editor in Visual Studio to make the reports do exactly what you want. Want to embed your shiny cool report inside a CRM form? Chapter 6 shows you how, in a very nicely written step-by-step. You also get to see the new package editor from the SDK--a must have if you're going to make your reports into a CRM solution (which you should always do.) In Chapter 7 Damian lets out a big CRM secret--dashboard panes are just reports. Yup. Once you've built the thing, plug it into a dashboard window and everyone will know your power. Not challenging enough for you? Then head over to chapter 8 and write some ASP.NET pages that use FetchXML to populate standard ASP.NET report and chart controls. This is a great option to create server-side report distribution to people who don't have the CRM client. And you'll be glad to know that CRM 2011 (as long as you have UR12/Polaris with the updated forms) will deliver your awesome reports to iThings, Surfaces, almost all kinds of mobile device and tablets, and the best part is that you don't have to do much beyond just taking the credit. To really rock your MSCRM reporting world, you'll want at least passing familiarity with CRM advanced find, SRS, BIDS, and Visual Studio, because that's what you use when you're a CRM reporting ninja. Like Damian Sinay, 0 of 0 people found the following review helpful. Helpful technical reporting reference I would recommend for new Dynamics CRM users and developers

By MojeReporting is already a fundamental pillar for many companies and senior management. It brings the ability to understand key factors of the business such as the volume of opportunities, revenue and performance. The book Microsoft Dynamics CRM 2011 Reporting is a useful technical guide which delivers a simple and clear overview of the available reporting options within the platform Microsoft Dynamics CRM. Microsoft Dynamics CRM is a flexible business solution based on SQL server that provides different and several reporting capabilities. Business users can create their own reports without real technical knowledge. At the same time, more complex designs can be implemented by developers or technical administrators using known Microsoft tools like Visual Studio or Report Builder. The author of the book, an experience Microsoft MVP, have captured all this reporting functionality within the same. The book follows an intuitive structure, explaining how to create simple reports using the Report Wizard of Dynamics CRM and covering basics technical aspects like SQL and Fetch XML. Gradually, it introduces more complex implementations using SQL Server Reporting Services, integration with web resources and generation of reports using other technologies such as ASP.NET or Silverlight. Finally, the book offers a couple of interesting chapters related to Failure Recovery, Best Practises and Mobile reporting, which are very important aspects for enterprise implementations. Other basic reporting features like Charts and Dashboard are also mentioned in the book. However, a topic which is not included in the book is the Export to Excel feature. With Dynamics CRM, users have the ability to create custom views and queries that can be exported to Excel. This is a very useful functionality, especially considering that many users are already familiar with Excel and its report capabilities. Personally I have enjoyed reading Microsoft Dynamics CRM 2011 Reporting. It is a helpful reference I would recommend for new Dynamics CRM users and developers. It contains many images and screenshots that make very easy to understand and follow Damian Sinay's explanations. 0 of 0 people found the following review helpful. This book is clear and concise and offers much more information than I expected

By agnewfarms Microsoft Dynamics CRM 2011 Reporting by Damian Sinay is a great resource for creating and running reports. The description "Everything you need to know to work with report in Dynamics CRM 2011" is an accurate representation. The minute I started reading it, I knew it was exactly what I was looking for. The book starts out with an introduction to reporting that covers all the basics from report types all the way to Installation and configuration of the "Report Authoring Extension" for Visual Studio. The second chapter has a great overview of SQL terminology from select to group by. The third chapter jumps right into creating your first report and publishing using report wizard or Visual studio. There is information on using SQL Server Report builder from SSRS which the author feels is better than wizard and great if you don't have visual studio. There are clear instructions on how to create reports in report wizard, exporting the RDL to modify them and then load them back up to run them. The books covers more advanced topics such as Contextual Reports, Inline Reports, web resources, the developer toolkit, Dashboards, advanced custom reporting and automation. The book ends with a chapter on failure recovery, authentication and performance and then a final chapter on using the mobile client and the sales process. I have looked for training guides in the past - but I always had trouble finding books specific to the product but also giving the basics behind reporting services. This book is clear and concise and offers much more information than I expected. I am looking forward to using Microsoft Dynamics CRM 2011 Reporting book for training my staff on reports in Microsoft Dynamics CRM. MariAnne Woehrle, Senior Director of IT, CTAM, National Harbor, MD

In Detail All of the data entered into a CRM means nothing if it is unable to report the important information to our managers and executives in such a way that they can easily and quickly get the results they need. A better reporting system would enable them to make the necessary improvements to the processes that any business needs in a dynamic business world. For users and developers wishing to take advantage of using the report capabilities of Dynamics CRM, this is the book for you. Microsoft Dynamics CRM 2011 Reporting is a practical and excellent reference guide that provides you with a number of different options you can use to create and empower the Reporting capabilities of Dynamics CRM. This will give you a good grounding in using the reports in your Dynamics CRM 2011 implementations. This book looks at all the different options we can use to create reports in Dynamics CRM 2011, starting with SQL Reporting Services and custom reports, created in either CRM Report Wizard, SQL Report Builder, or Visual Studio. It will also show other options we can use such as dashboards, charts, and different ways to optimize and automate reports. We will also learn how to build our own reports either using the different wizards for basic reports or using Visual Studio for more complex reports. We will explore the options mobile CRM users have who want to run and see reports on these mobile devices.

Approach The book is a focused and step-by-step tutorial on Microsoft Dynamics CRM Reporting capabilities. It will enable Dynamics developers to create and manage reports, know what tools to use, how to use them, and where to find the data based on how it's being entered into the system with Dynamics CRM.

Who this book is for This book is great for users and developers new to the Dynamics CRM Reports and SQL Server Reporting services, and who are looking to get a good grounding in how to use the reporting capabilities of Dynamics CRM 2011. It's assumed that you will have some experience in HTML and JavaScript already to build the advanced reports, but no previous programming experience is required to build and learn how to create some basic to intermediate reports, which will be used during the exercises within this book.