Microsoft Dynamics CRM 2011 Reporting and Business Intelligence

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

Overview

- Create reports with SQL Reporting Services for CRM
- Empower your reports with the different Report Wizards and dashboards
- Troubleshoot and optimize your reports for better performance

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.

What you will learn from this book

- Understand the different report types we can create in Microsoft Dynamics CRM
- Learn basic database concepts like ERD and SQL and Fetch XML languages to create queries on our reports
- Create basic reports with the wizard and Visual Studio
- Build advanced reports with the SQL Report Builder
- Present reports in charts, dashboards and forms
- Integrate reports on CRM entity forms and extending the form's control capabilities
- Incorporate reports in CRM dashboards and understand chart basics to display important information
- Bind CRM data by using early or late binding and SQL reporting services report execution
- Follow the best practices and troubleshooting of different authentication issues

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 written 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.

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