



## **c360 Report Wizard User Guide**

Microsoft Dynamics CRM 3.0 compatible

Version 3.1.1  
c360 Solutions, Inc.  
[www.c360.com](http://www.c360.com)



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## c360 Report Wizard

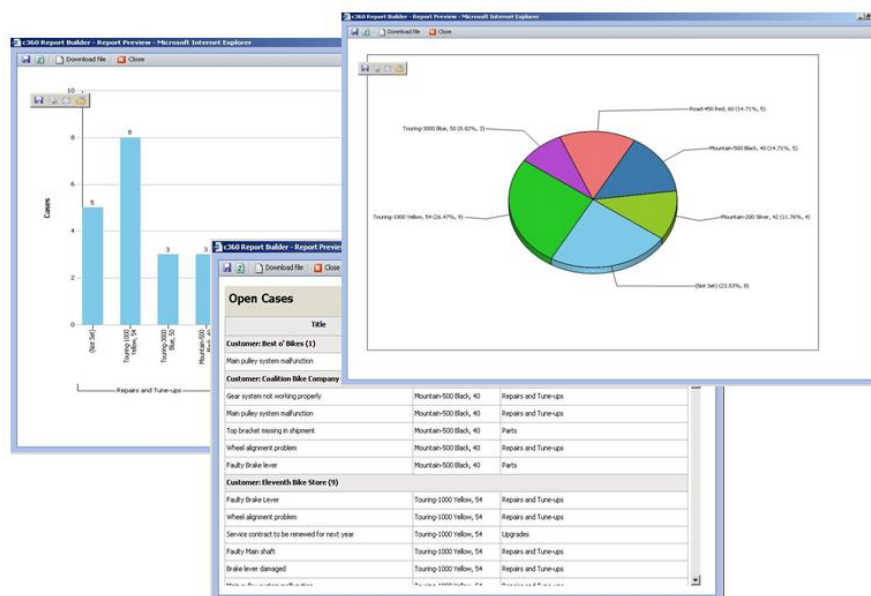
### Overview

c360 Report Wizard is a powerful report generator tool that allows Microsoft CRM users to easily and quickly create SQL Reporting Services reports **without writing any code**.

Report Wizard is built for simple end users allowing them to create reports from inside Microsoft CRM application. **No other tool is needed**. Reports are automatically generated according to Microsoft CRM style guidelines and preserve the security model of Microsoft CRM.

Creating the report query is based on simple Advanced Find like screen without the need to write any SQL scripts. Using the Report Wizard Microsoft CRM end users will be able to **create reports in 5 clicks**.

Using c360 Report Wizard users can reduce the time for creating SQL Server Reporting Services reports to few minutes.



**c360 Report Wizard works the way Microsoft CRM users do**



## Features

c360 Report Wizard features include:

- Report creator wizard allowing users to create reports from within Microsoft CRM in 5 steps.
- Save reports in Microsoft CRM.
- Download RDL file.
- Design report query using Advanced Find screen without writing any code.
- Generate tabular and graphic report in 5 steps.
- Apply automatic design styles according to Microsoft CRM style guidelines.
- Maintain the Microsoft CRM security model.
- Automatically generates Drill Down capabilities to access MS CRM records from within the report. The drill down is available only on tabular reports.



## Creating Reports

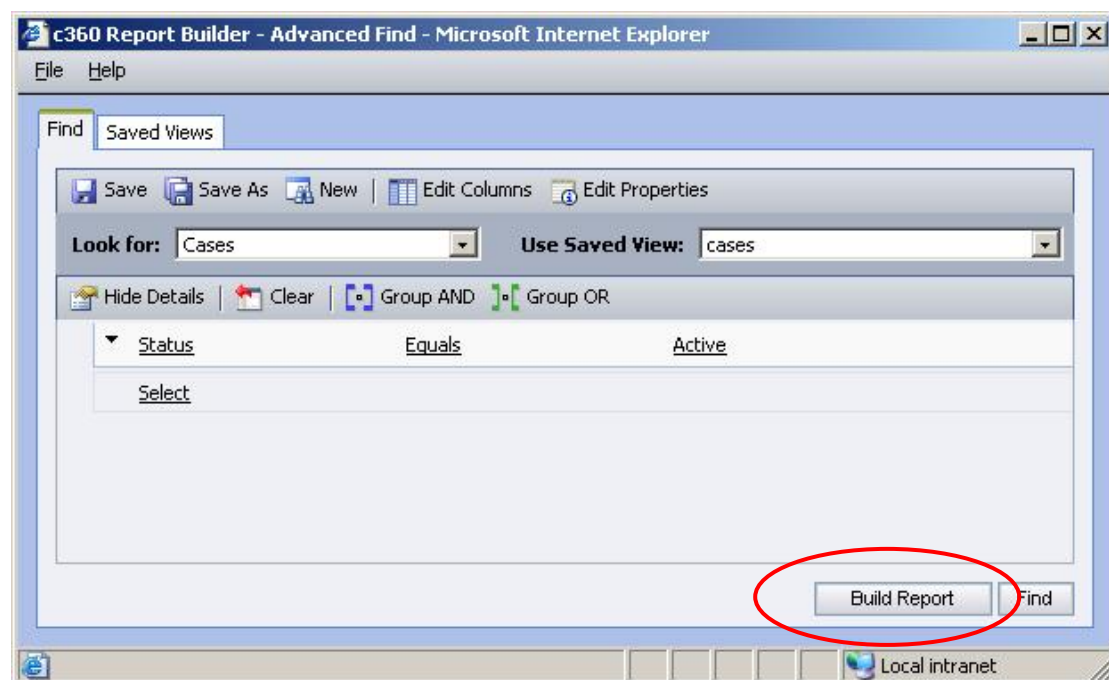
Creating reports using c360 Report Wizard is easy and simple. Users can create tabular and chart reports without writing any code.

### Define the query

To access the Report Wizard, navigate to the main tool bar inside Microsoft CRM and press the Report Wizard button.



the next step will be defining the query to use with the report. this is done using Microsoft CRM advanced find screen. You can also use predefined saved queries from the Advanced find Saved Views tab. the columns that will appear in the report are the columns that were defined using the "Edit Columns" button.





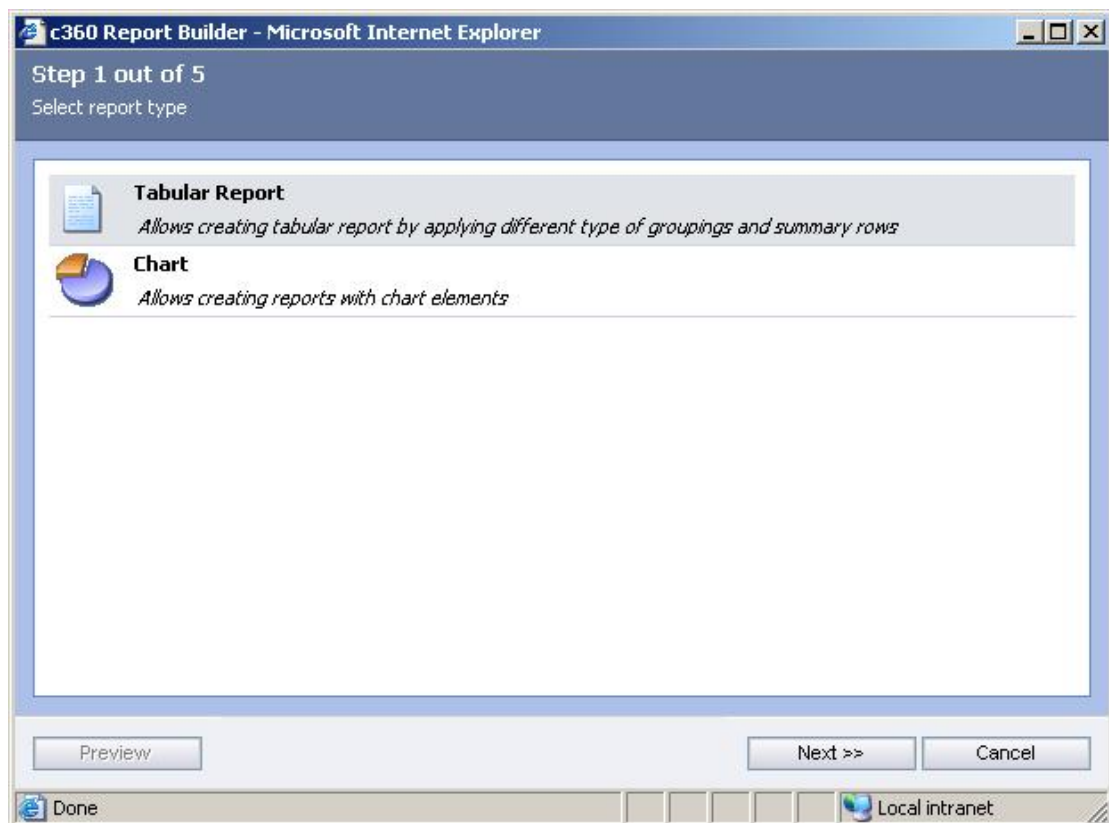
## Launch the Wizard

Once we have defined the query, we can launch the Report Wizard wizard by pressing the Build Report button located at the bottom of the Advanced Find screen.

After the wizard is launched we can choose to create a tabular report or chart report:

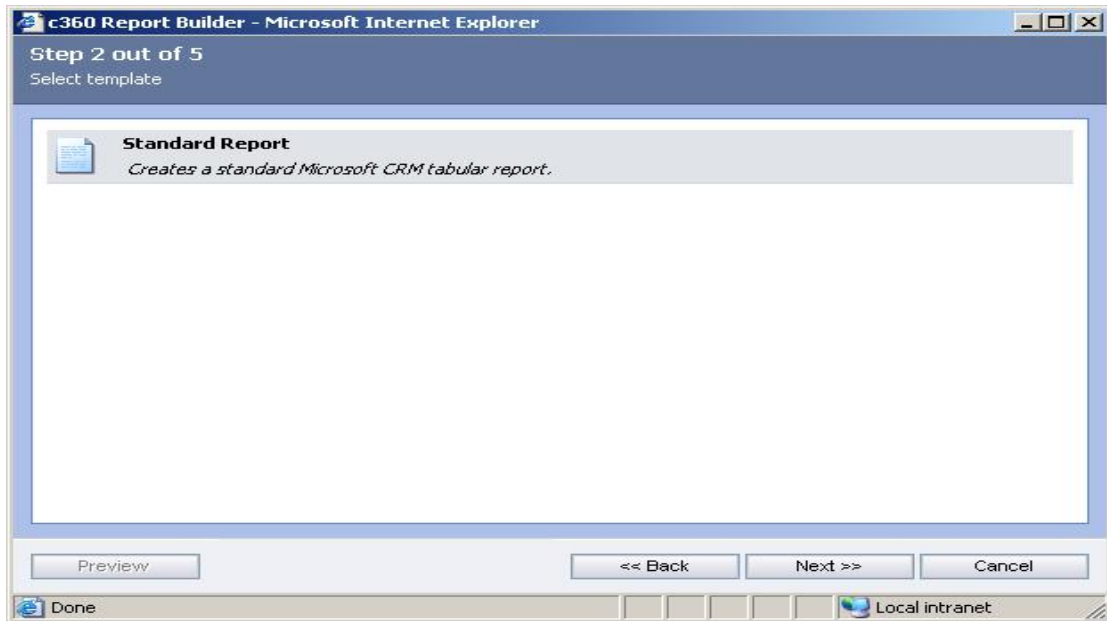
### Create Tabular Report:

Step 1: Select to create tabular report and press OK.

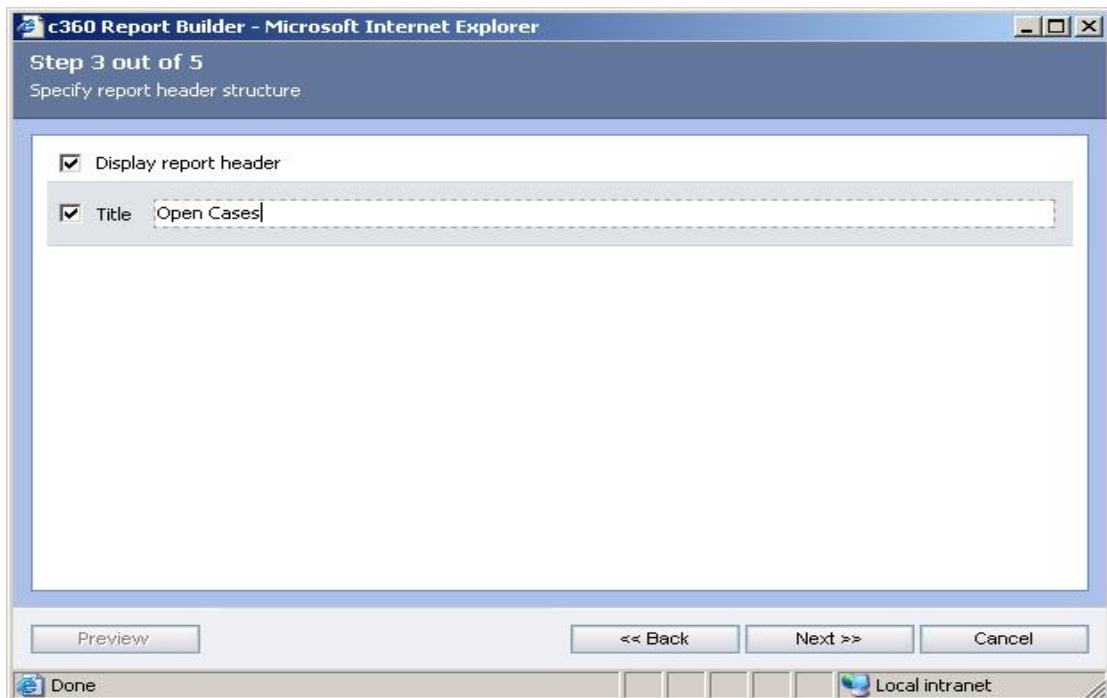




Step 2: Choose template for the tabular report from a set of predefined templates.

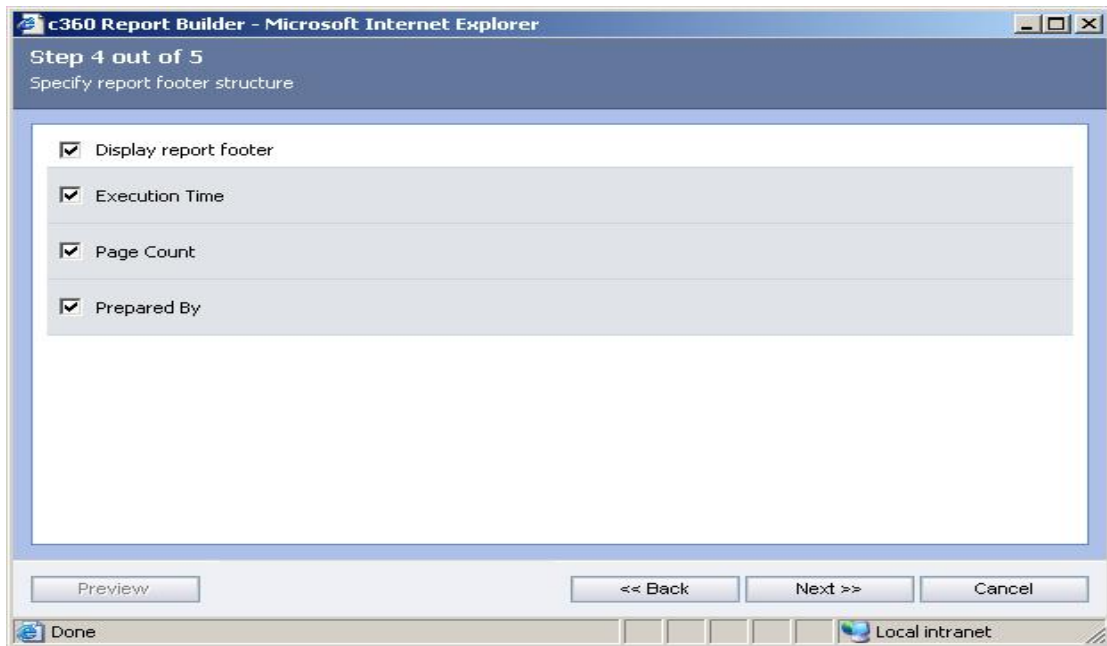


Step 3: Specify report header. The header contains the report title.

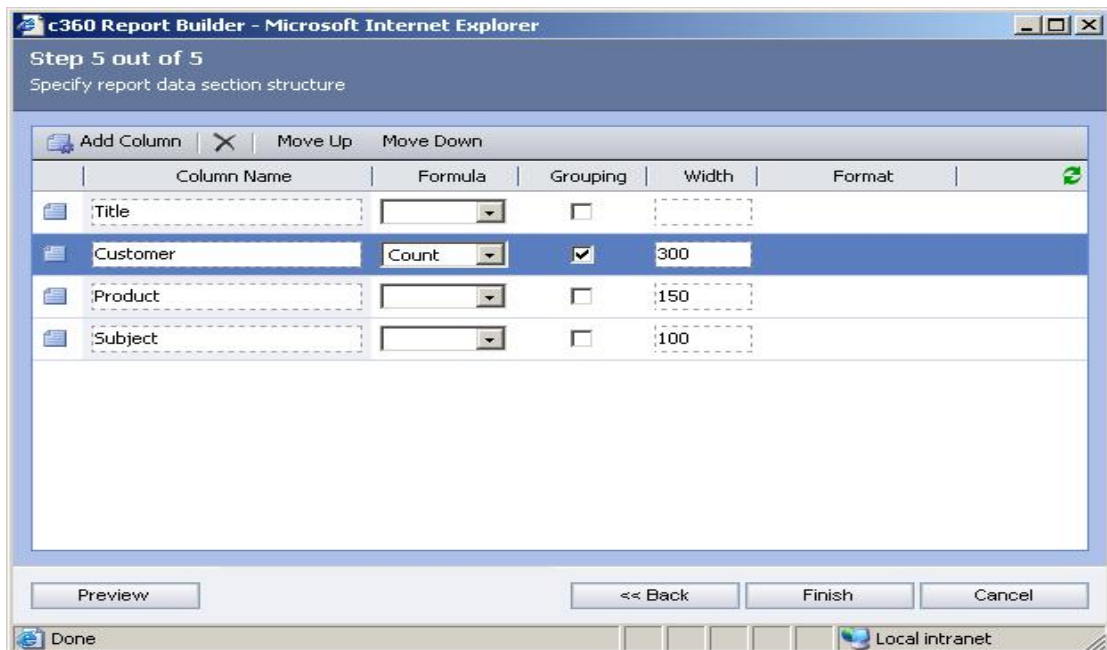




Step 4: Choose footer parameters. the parameters include the report execution time, number of pages and the name of the user who executes the report.



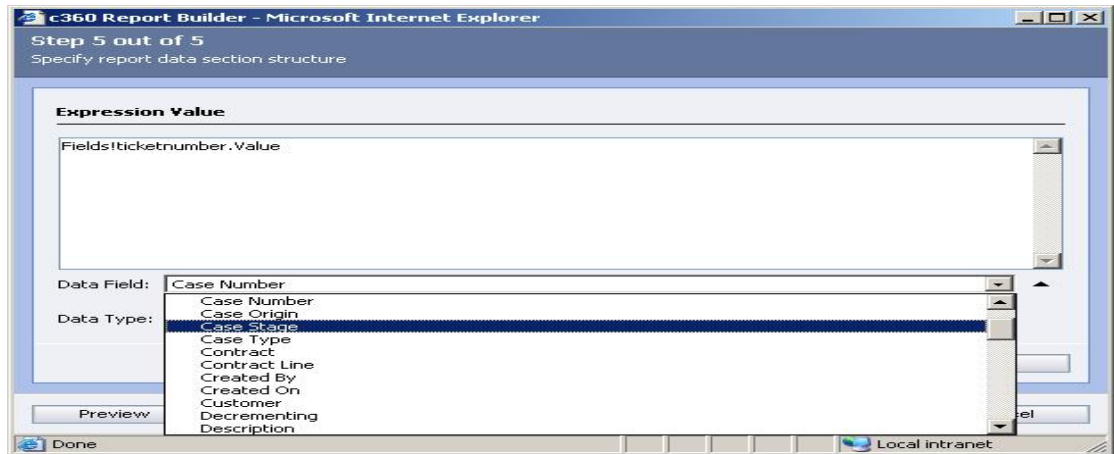
Step 5: Edit report data. Using this step, users can edit the report data columns by specifying column header, apply date formats and adding additional columns from different entities.





Step 5 allows you to:

- Define grouping on report columns by marking the group checkbox
- Set Count/Sum formulas in order to automatically sum up column data
- Set the width of the column. if no width is specified, Report Wizard will automatically expand the column to the remaining width of the page.
- Set format of date column using predefined set of formats
- Rearrange the columns order using the Move Up and Move Down buttons
- Delete a column from the report
- Add a new column to the report:
  - o Press the Add Column button
  - o Double click the column icon to launch the expression screen



- o Using the Data field drop down, choose the desired field you wish to add to the report. You can also add fields from related entities by choosing Related Entity and then choosing from the related entity set of attributes
- o After choosing the desired attribute, press the black arrow to the right of the drop down in order to insert the attribute expression into the report
- o Press OK to finish



Launch the report by pressing the Finish or Preview button:

c360 Report Builder - Report Preview - Microsoft Internet Explorer

Download file Close

### Open Cases


Title	Product	Subject
<b>Customer: Best o' Bikes (1)</b>		
Main pulley system malfunction		Repairs and Tune-ups
<b>Customer: Coalition Bike Company (5)</b>		
Gear system not working properly	Mountain-500 Black, 40	Repairs and Tune-ups
Main pulley system malfunction	Mountain-500 Black, 40	Repairs and Tune-ups
Top bracket missing in shipment	Mountain-500 Black, 40	Parts
Wheel alignment problem	Mountain-500 Black, 40	Repairs and Tune-ups
Faulty Brake lever	Mountain-500 Black, 40	Parts
<b>Customer: Eleventh Bike Store (9)</b>		
Faulty Brake Lever	Touring-1000 Yellow, 54	Repairs and Tune-ups
Wheel alignment problem	Touring-1000 Yellow, 54	Repairs and Tune-ups
Service contract to be renewed for next year	Touring-1000 Yellow, 54	Upgrades
Faulty Main shaft	Touring-1000 Yellow, 54	Repairs and Tune-ups
Brake lever damaged	Touring-1000 Yellow, 54	Repairs and Tune-ups


### Create Chart Report:

Step 1: Select to create chart report and press OK.

c360 Report Builder - Microsoft Internet Explorer

Step 1 out of 5  
Select report type

 **Tabular Report**  
*Allows creating tabular report by applying different type of groupings and summary rows*

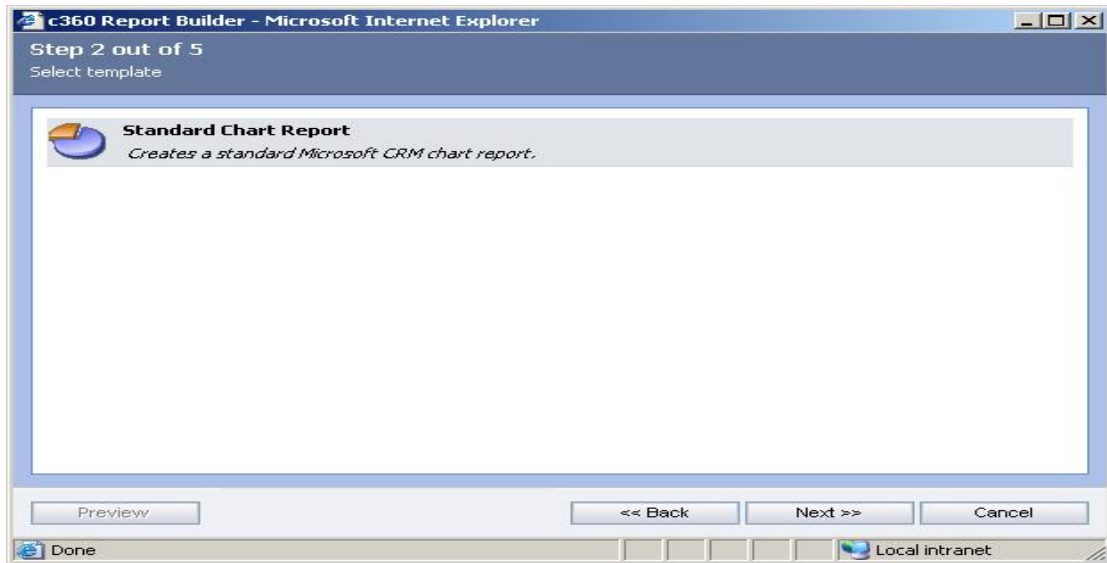
 **Chart**  
*Allows creating reports with chart elements*

Preview      Next >>      Cancel

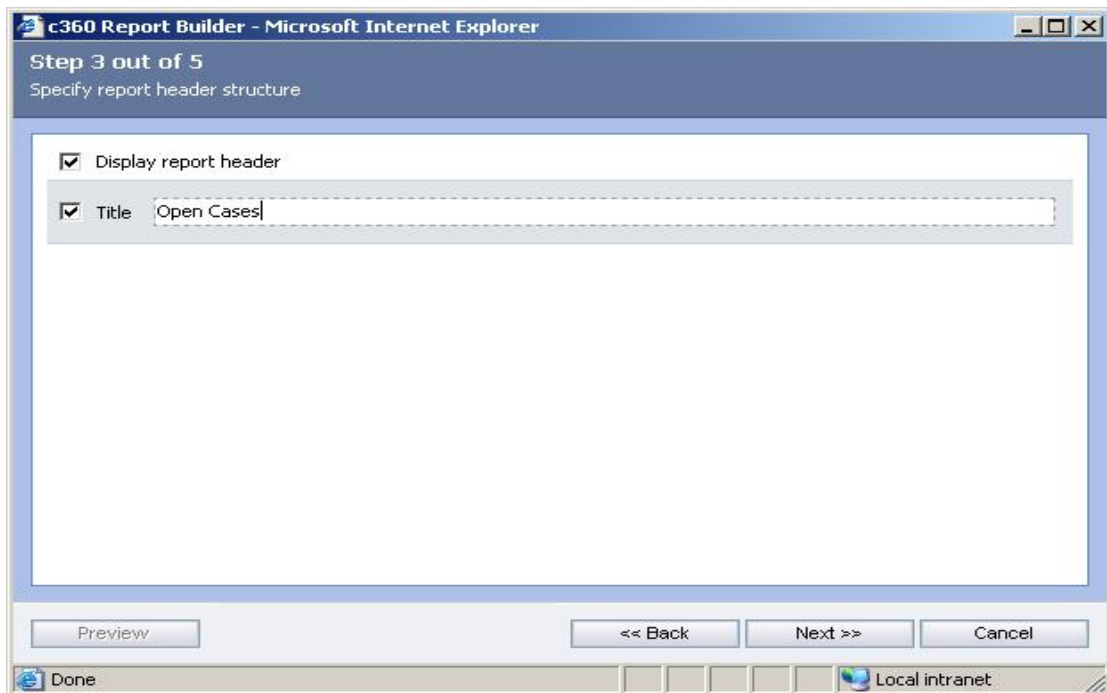
Done      Local intranet



Step 2: Choose template for the chart report from a set of predefined templates.



Step 3: Specify report header. The header contains the report title.





Step 4: Choose footer parameters. the parameters include the report execution time, number of pages and the name of the user who executes the report.

A screenshot of the 'c360 Report Builder - Microsoft Internet Explorer' window. The title bar shows the application name and standard window controls. The main content area is titled 'Step 4 out of 5' and 'Specify report footer structure'. It contains a list of four items, each with a checked checkbox: 'Display report footer', 'Execution Time', 'Page Count', and 'Prepared By'. At the bottom of the window, there are buttons for 'Preview', '<< Back', 'Next >>', and 'Cancel'. The status bar at the very bottom shows 'Done' and 'Local intranet'.

Step 5: Edit report data. Using this step, users can choose the chart type (Pie, Donut or Column) and specify the data and category values of the report.

A screenshot of the 'c360 Report Builder - Microsoft Internet Explorer' window. The title bar shows the application name and standard window controls. The main content area is titled 'Step 5 out of 5' and 'Specify report data section structure'. It contains a 'Chart Type' dropdown menu set to 'Thumbnail Pie'. Below this is a section for 'Data Value' with a 'Field Name' dropdown set to 'Case' and a 'Formula' dropdown set to 'Count'. Underneath is a section for 'Category Values' with a 'Field Name' dropdown set to 'Product'. At the bottom of the window, there are buttons for 'Preview', '<< Back', 'Finish', and 'Cancel'. The status bar at the very bottom shows 'Done' and 'Local intranet'.



**c360 Report Builder - Microsoft Internet Explorer**

Step 5 out of 5  
Specify report data section structure

Chart Type: Column

**Data Value**

Field Name: Case      Formula: Count

**Category Values**

Field Name: Product  
Field Name: Subject  
Field Name:

**Axis Title**

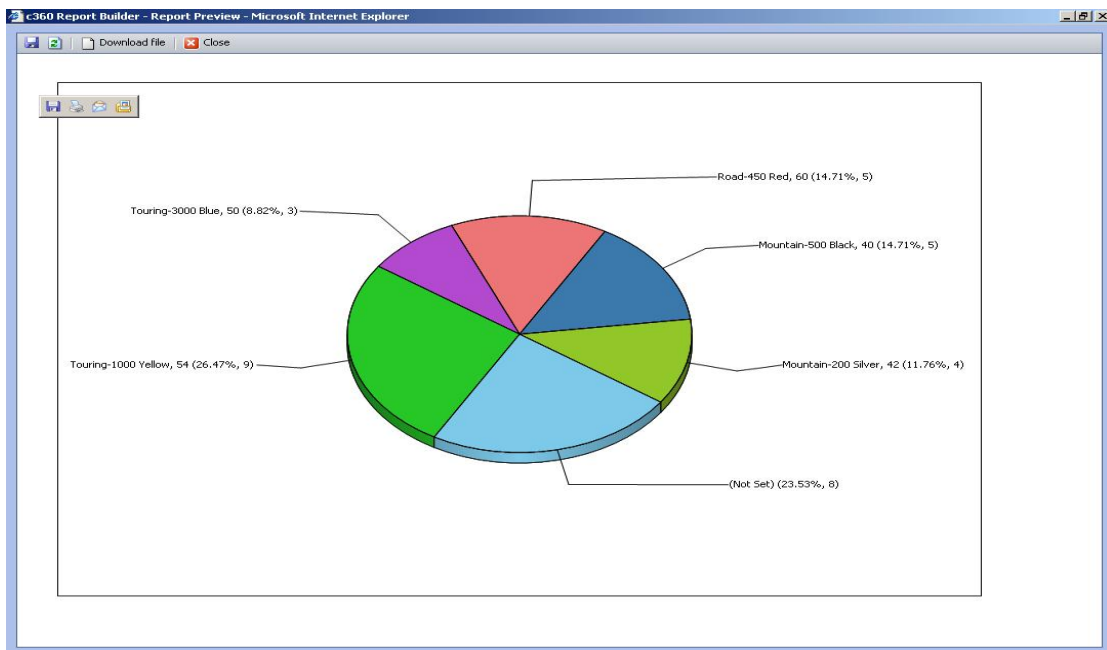
X Axis: Products/Subjects  
Y Axis: Cases

Buttons: Preview, << Back, Finish, Cancel

Status: Done      Local intranet

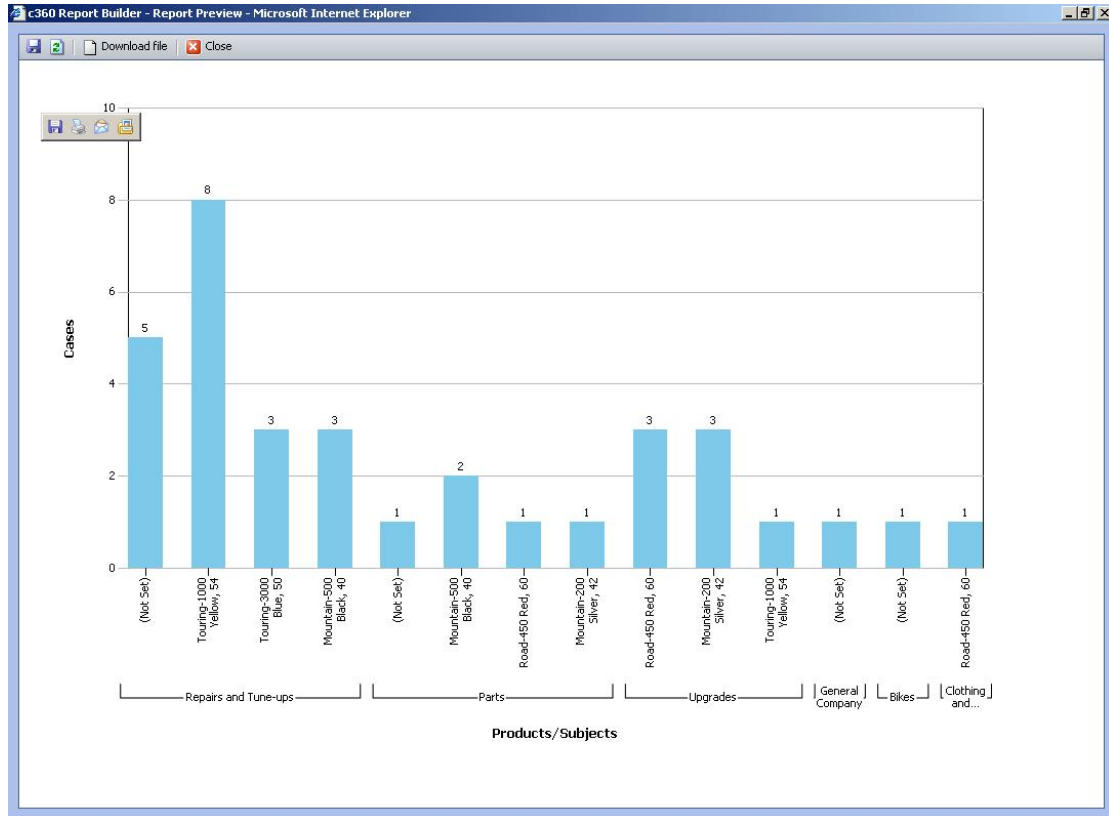
Launch the report by pressing the Finish or Preview button:

Thumbnail Pie example:





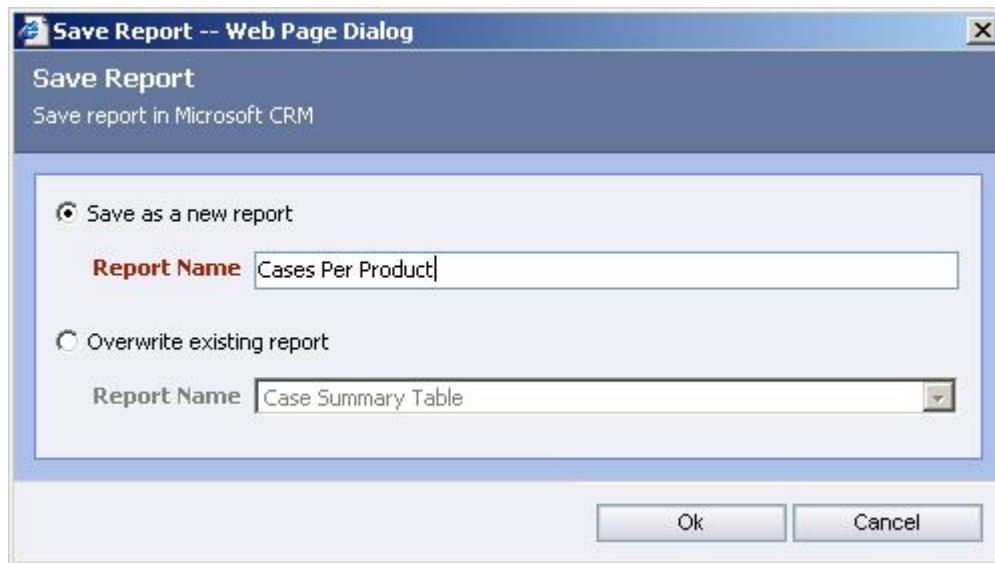
Column example:





## Saving the Report

After generating the report, users can easily save the report to Microsoft CRM by pressing the Save button in the report preview screen. After pressing the Save button, a save screen is launched. Using the Save screen users can define the name of the report or overwrite existing report in Microsoft CRM.



Pressing the OK button redirects to the following screen where users can choose what to do next:

