

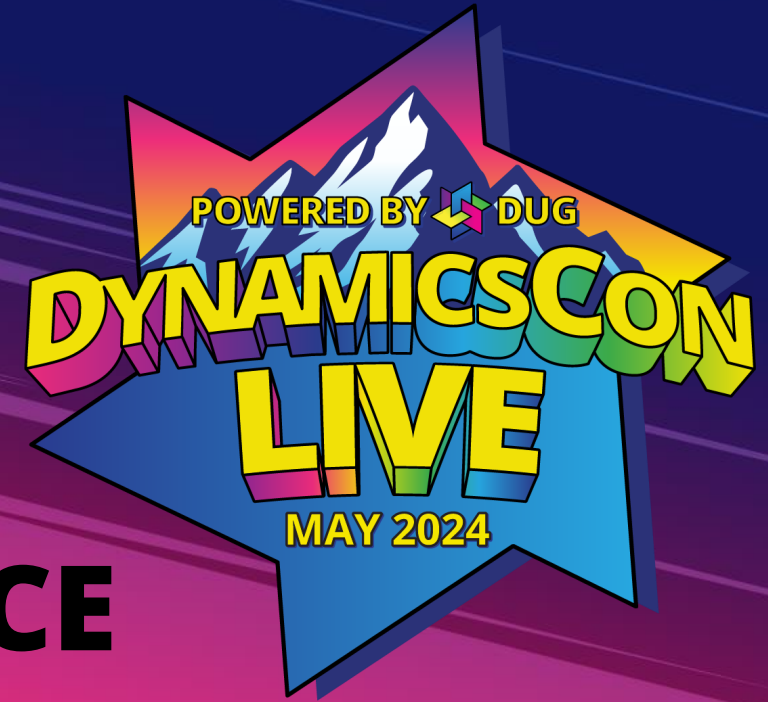


POWERED BY  DUG

# DYNAMICS CON LIVE

MAY 2024

# Starting with Charts, Dashboards, and Reports in CE





Facilitator

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for D365 CE



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# DASHBOARDS



# Dashboards

## Overview of Dashboards

- Customer Service Dashboards
  - Navigating and understanding the data within dashboards
- Customer Service Representative Social Dashboard
  - Walk through navigating and understanding the data within the dashboard
    - View Records
    - Drill down metrics
    - Sharing dashboard (personal)
    - Create new chart from dashboard or cases (chart data)



# Dashboards

## Overview of Dashboards

- **Customer Service Dashboards**
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    - Sharing dashboard (personal)
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# Dashboard Overview Demo

The screenshot displays the Dynamics 365 Customer Service Hub interface in a sandbox environment. The top navigation bar includes the Dynamics 365 logo, the text "Customer Service Hub" (highlighted with a red arrow), "SANDBOX", and a "Try the new look" toggle. The left navigation pane lists categories: Home, Recent, Pinned, My Work, Customers, and Social Profiles. The "Dashboards" item under "My Work" is selected. The main content area shows a "Connected Customer Service Dashboard" dropdown menu with a red box highlighting the first item, "Connected Customer Service Dashboard". Other items in the dropdown include "Customer Service Manager Dashboard", "Customer Service Operations Dashboard", "Customer Service Performance Dashboard", "Customer Service Representative Dashboard", "Customer Service Representative Social Dashboard", "Knowledge Manager", "My Knowledge Dashboard", "Tier 1 Dashboard", and "Tier 2 Dashboard".





# Dashboards

## Overview of Dashboards

- Customer Service Dashboards
  - Navigating and understanding the data within dashboards
- **Customer Service Representative Social Dashboard**
  - **Walk through navigating and understanding the data within the dashboard**
    - **View Records**
    - **Drill down metrics**
    - **Sharing dashboard (personal)**
    - **Create new chart from dashboard or cases (chart data)**



# Dashboard Overview Demo

← Save As + New ✓ Set As Default ↻ Refresh All

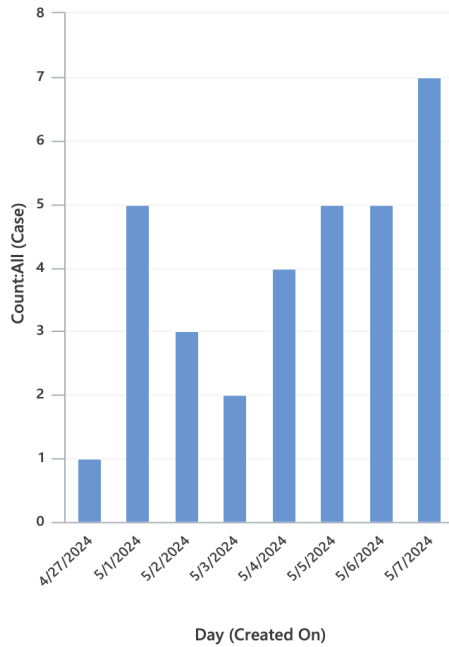
🔗 Share

## Customer Service Representative Social Dashboard ▾

### My Active Cases

↻ 📄 🗑️

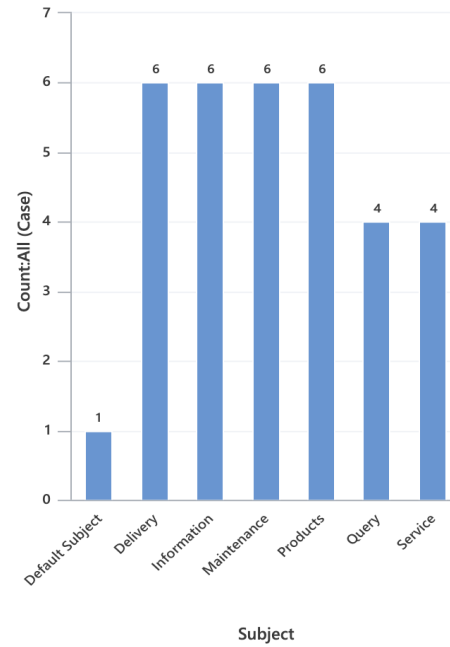
Cases by SLA Status Over Week



### All Cases

↻ 📄 🗑️

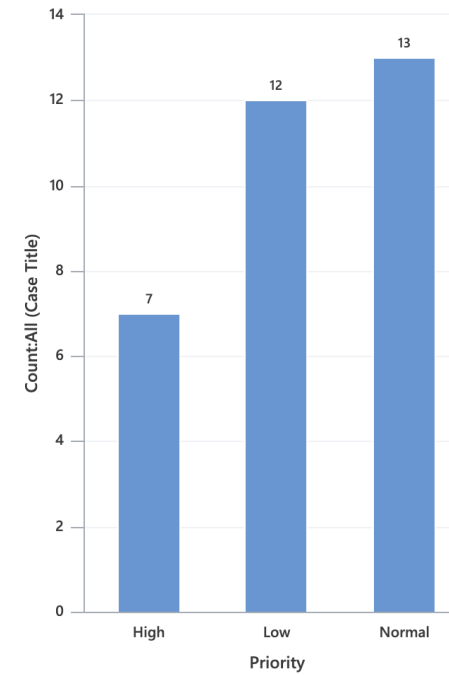
Case Mix by Incident Type



### Active Cases

↻ 📄 🗑️

Case Mix (By Priority)



# Dashboard Overview Demo

← Focused view Hide Chart + New Case Delete | v Refresh Run Report v Email a Link | v Visualize this view : Share v

My Active Cases v ←

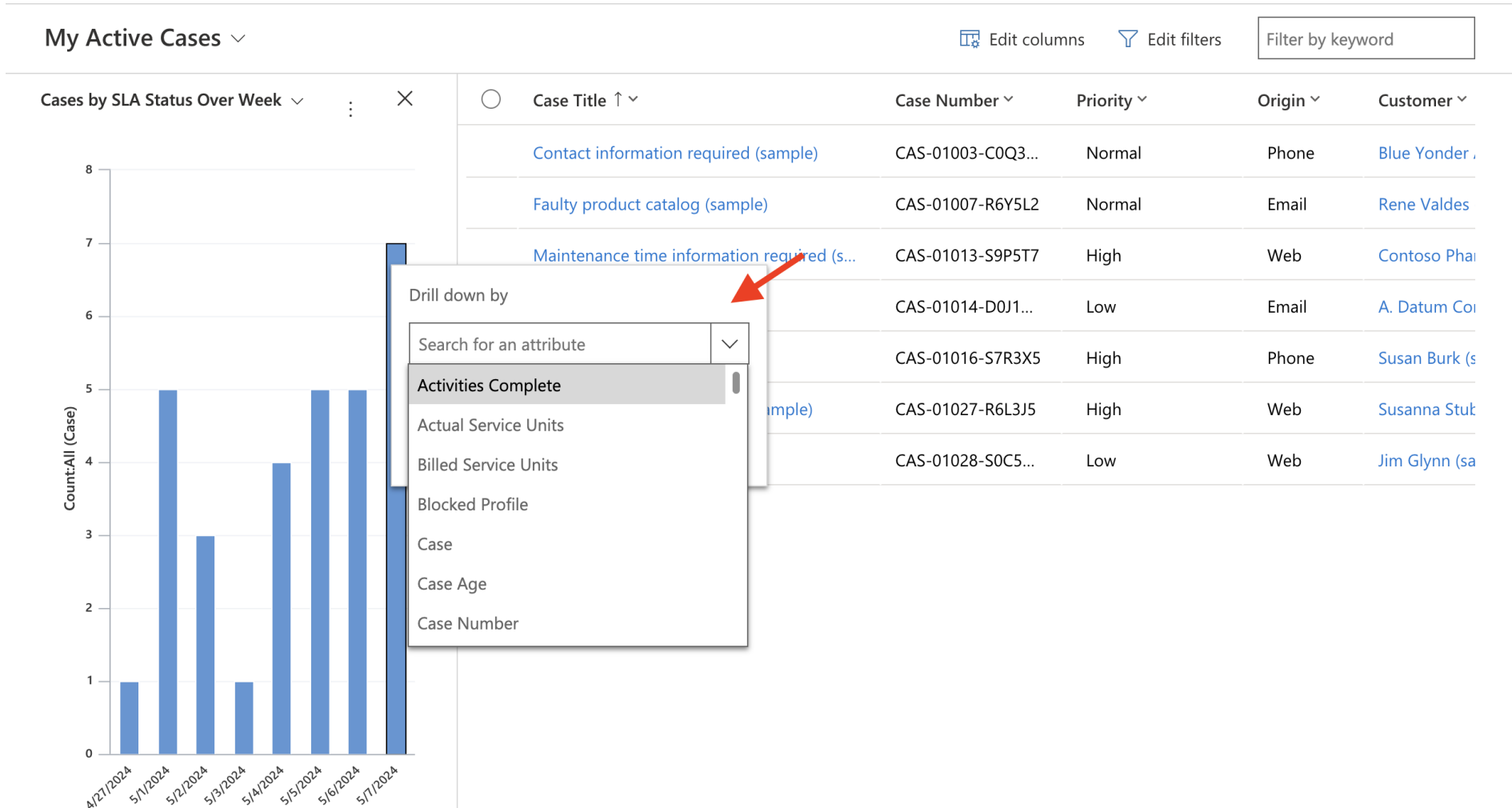
Edit columns Edit filters Filter by keyword

Cases by SLA Status Over Week v X

Case Title ↑	Case Number	Priority	Origin	Customer
<a href="#">Average order shipment time (sample)</a>	CAS-01000-Y6Q2...	Normal	Web	Litware, In
<a href="#">Complete overhaul required (sample)</a>	CAS-01001-Q9Q6...	High	Web	Paul Cann
<a href="#">Contact information requested (sample)</a>	CAS-01002-Z4M5...	Normal	Phone	Alpine Ski
<a href="#">Contact information required (sample)</a>	CAS-01003-C0Q3...	Normal	Phone	Blue Yond
<a href="#">Damaged during shipment (sample)</a>	CAS-01004-G5H8...	Low	Email	Yvonne M
<a href="#">Defective item delivered (sample)</a>	CAS-01005-Y0Z5...	Low	Phone	City Powe
<a href="#">Delivery never arrived (sample)</a>	CAS-01006-R8M0...	Low	Phone	Alpine Ski
<a href="#">Faulty product catalog (sample)</a>	CAS-01007-R6Y5L2	Normal	Email	Rene Vald
<a href="#">Incorrect product information (sample)</a>	CAS-01032-X7Q5...	Normal	Phone	Scott Kon
<a href="#">Information on the product (sample)</a>	CAS-01008-B6D4...	Low	Email	Thomas A
<a href="#">Item defective (sample)</a>	CAS-01009-X2W4...	Normal	Email	Fabrikam,
<a href="#">Item defective on delivery (sample)</a>	CAS-01010-J0B0T6	High	Phone	Maria Can
<a href="#">Maintenance information (sample)</a>	CAS-01011-J9Y8X0	Low	Phone	Nancy An



# Dashboard Overview Demo



# Dashboard Overview Demo

Customer Service Hub **SANDBOX** Try the new look

Save As New Set As Default Refresh All Share

### Customer Service Representative Social Dashboard

#### My Active Cases

Cases by SLA Status Over Week

Day (Created On)	Count:All (Case)
4/27/2024	1
4/30/2024	1
5/1/2024	3
5/2/2024	1
5/3/2024	1
5/4/2024	3
5/5/2024	3
5/6/2024	3

#### All Cases

Dashboard Properties

Provide a name and description for this dashboard. The name will be visible in the dashboard list.

Name \*  
Customer Service Representative Social Dashboard

Description  
Shows the key performance indicators for a customer service representative.

Enable for mobile

Save Cancel

#### Active Cases

Case Mix (By Priority)

Priority	Count:All (Case Title)
High	5
Low	8
Normal	10



# Dashboard Overview Demo

Customer Service Hub **SANDBOX** Try the new look

← Save As + New Edit Delete ✓ Set As Default Assign Refresh All Share

### Customer Service Representative Social Dashboard...

- Email link
- Copy link
- Manage access

#### My Active Cases

Cases by SLA Status Over Week

SLA Status	Count
9	1

#### All Cases

Case Mix by Incident Type

Incident Type	Count
1	6
2	6
3	6
4	6

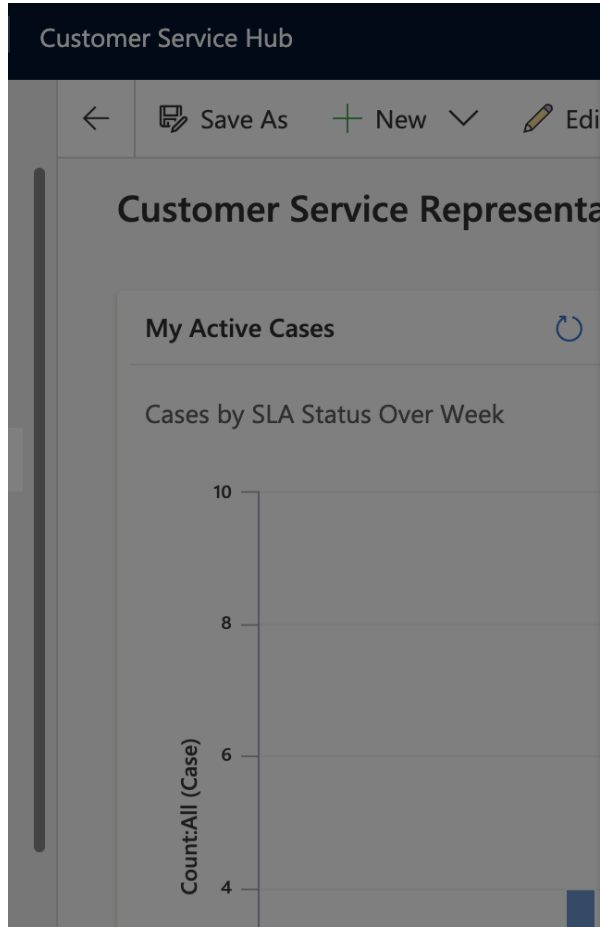
#### Active Cases

Case Mix (By Priority)

Priority	Count
10	1



# Dashboard Overview Demo



## Share records

Manage who can see your dashboard and how much access they get. If the dashboard contains views with restricted access, they should be shared as well in order for individuals to have full access to the dashboard. Changes made to users or teams will saved after clicking on the Share button.

### Add user/team

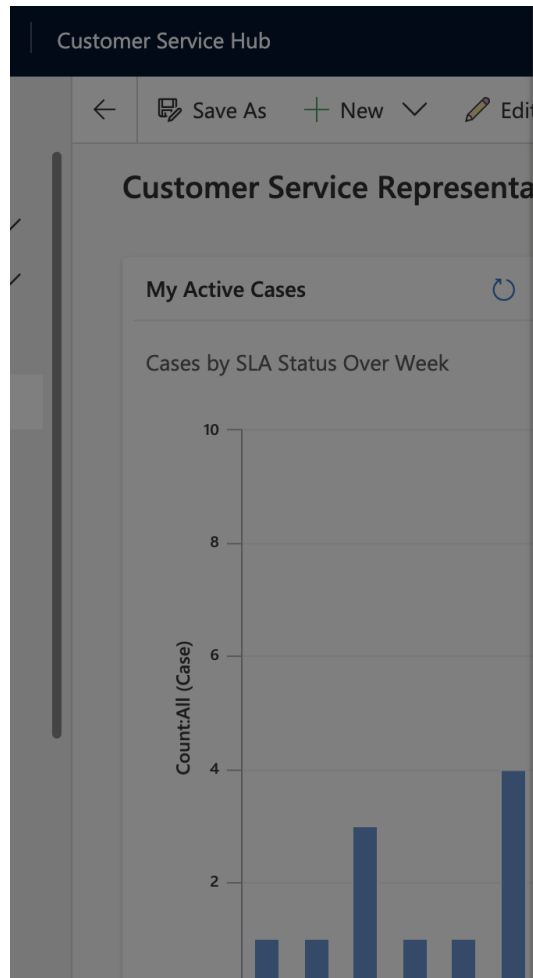
---



Select a person or group to assign their permission(s)



# Dashboard Overview Demo




## Share records

Manage who can see your dashboard and how much access they get. If the dashboard contains views with restricted access, they should be shared as well in order for individuals to have full access to the dashboard. Changes made to users or teams will be saved after clicking on the Share button.

Add user/team

Search input:

Results from: [Users](#) [Teams](#)

-  **Bridgette Szkalak (Available)**  
org0d6ad03f

[+ New Record](#)   [Advanced lookup](#)

Select a person or group to assign their permission(s)





# Dashboard Overview Demo

← Focused view Hide Chart + New Case Delete | Refresh Run Report Email a Link |

## My Active Cases

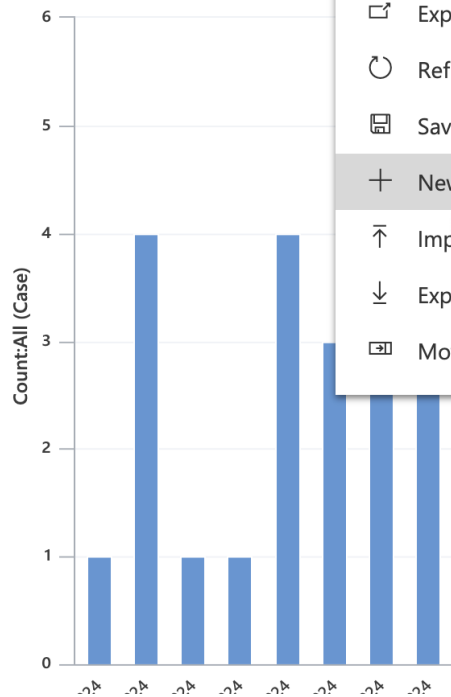
Edit columns Edit

Cases by SLA Status Over W...

Case Title ↑

Case Number ↓

Priorit



- Expand Chart
- Refresh
- Save As
- New
- Import
- Export
- Move right

shipment time (sample)	CAS-01000-Y6Q2...	Norr
haul required (sample)	CAS-01001-Q9Q6...	High
tion requested (sample)	CAS-01002-Z4M5...	Norr
tion required (sample)	CAS-01003-COQ3...	Norr
g shipment (sample)	CAS-01004-G5H8...	Low
delivered (sample)	CAS-01005-Y0Z5...	Low
Faulty product catalog (sample)	CAS-01007-R6Y5L2	Norr
Incorrect product information (sample)	CAS-01032-X7Q5...	Norr
Information on the product (sample)	CAS-01008-B6D4...	Low
Item defective (sample)	CAS-01009-X2W4...	Norr
Item defective on delivery (sample)	CAS-01010-J0B0T6	High



# Dashboard Overview Demo

Save Save & Close Save As

Column Bar Area Line Pie Funnel Tag Doughnut

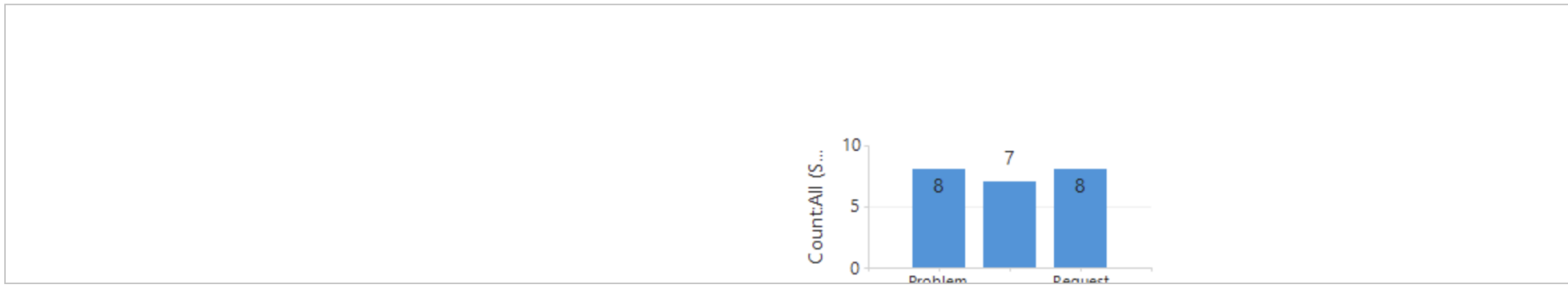
Top X Rule Bottom X Rule Clear Rules

Save Charts Top/Bottom Rules

Working on solution: Default Solution

View used for chart preview

My Active Cases



Legend Entries ( Series )

Status Reason Count:All

+ Add a series

Horizontal ( Category ) Axis Labels

Case Type

+ Add a category



# Dashboard Overview Demo

My Active Cases ▼

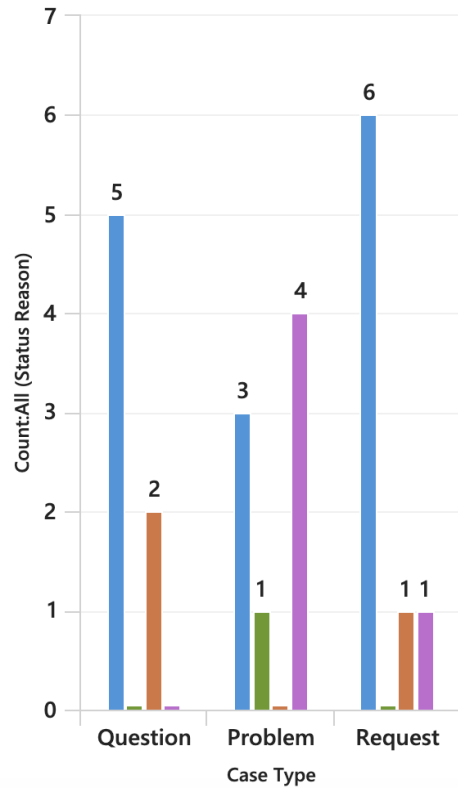
Edit columns

Edit filters

Filter by keyword

My Active Cases by Case Type ▼ ⋮ ✕

◀ ● In Progress ● On Hold ● Waiting for C ▶



Case Title <span>↑</span> <span>▼</span>	Case Number <span>▼</span>	Priority <span>▼</span>	Origin <span>▼</span>	Cust
<a href="#">Average order shipment time (sample)</a>	CAS-01000-Y6Q2...	Normal	Web	Litv
<a href="#">Complete overhaul required (sample)</a>	CAS-01001-Q9Q6...	High	Web	Pa
<a href="#">Contact information requested (sample)</a>	CAS-01002-Z4M5...	Normal	Phone	Alp
<a href="#">Contact information required (sample)</a>	CAS-01003-C0Q3...	Normal	Phone	Blu
<a href="#">Damaged during shipment (sample)</a>	CAS-01004-G5H8...	Low	Email	Yvc
<a href="#">Defective item delivered (sample)</a>	CAS-01005-Y0Z5...	Low	Phone	City
<a href="#">Faulty product catalog (sample)</a>	CAS-01007-R6Y5L2	Normal	Email	Rer
<a href="#">Incorrect product information (sample)</a>	CAS-01032-X7Q5...	Normal	Phone	Sc
<a href="#">Information on the product (sample)</a>	CAS-01008-B6D4...	Low	Email	Th
<a href="#">Item defective (sample)</a>	CAS-01009-X2W4...	Normal	Email	Fat
<a href="#">Item defective on delivery (sample)</a>	CAS-01010-J0B0T6	High	Phone	Ma

1 - 23 of 23

◀ ◁ Page 1



# Dashboards

## Configuration of Dashboards

- **Creating and configuring dashboards**
  - **Creating new personal dashboard from existing**
    - **Save As, Edit**
    - **Edit and add components**
  - **Creating new system dashboard under advance settings**
    - Advance settings, Solutions
    - Create new dashboard
    - Edit and add components
    - Dashboard level security
    - Save and publish



# Dashboard Configuration Demo

**Customer Service Hub** | **SANDBOX** | Try the new look

Save As | New | Set As Default | Refresh All | Share

### Customer Service Representative Social Dashboard

**Dashboard Properties**

Provide a name and description for this dashboard. The name will be visible in the dashboard list.

Name \*  
Customer Service Representative Social Dashboard

Description  
Shows the key performance indicators for a customer service representative.

Enable for mobile

Save | Cancel

**My Active Cases** | **All Cases** | **Active Cases**

**Cases by SLA Status Over Week**

Day (Created On)	Count:All (Case)
4/27/2024	1
4/30/2024	1
5/1/2024	3
5/2/2024	1
5/3/2024	1
5/4/2024	3
5/5/2024	3
5/6/2024	3

**All Cases**

Subject	Count:All (Case Title)
Default Subject	1
Delivery	3
Information	3
Maintenance	3
Products	3
Query	3
Service	3

**Case Mix (By Priority)**

Priority	Count:All (Case Title)
High	5
Low	8
Normal	10



# Dashboard Configuration Demo

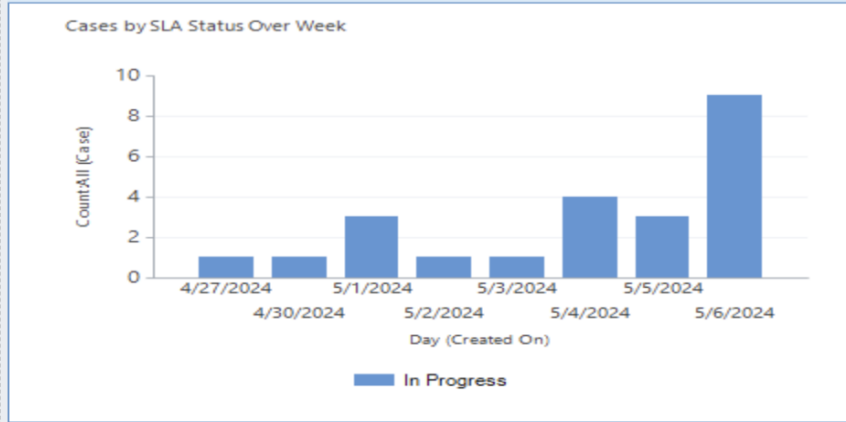
SAVE CLOSE PROPERTIES EDIT COMPONENT CHART LIST WEB RESOURCE TIMELINE IFRAME ...

Name: \* Customer Service Representative Social Dashboard - Personal

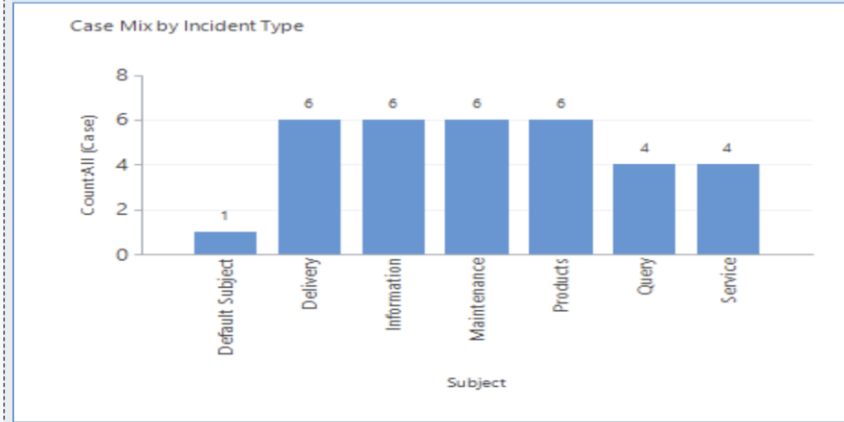
Content

## Section

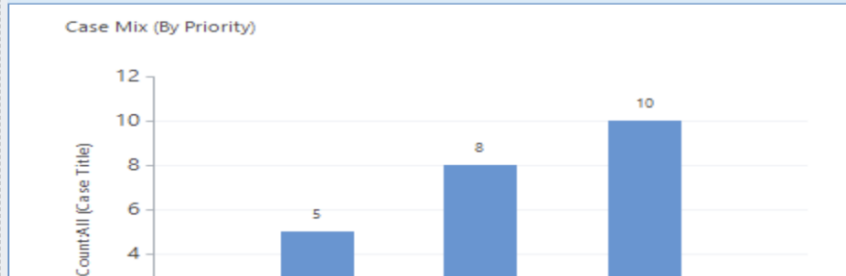
### Chart



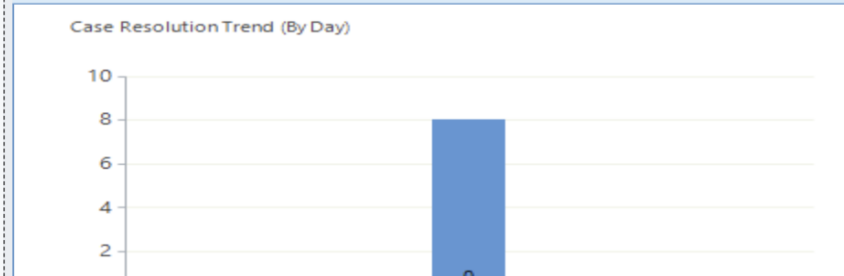
### Chart



### Chart



### Chart



# Dashboard Configuration Demo

The screenshot shows the 'Set Properties' dialog for a chart in Power Apps. The dialog is titled 'Set Properties' and has the subtitle 'Set the List or Chart properties.' It is divided into several sections:

- Data Source:** Specifies the primary data source for this list or chart. It includes dropdowns for 'Records' (All Record Types), 'Entity' (Cases), and 'Default View' (My Active Cases).
- Additional Options:** Includes checkboxes for 'Display Search Box' and 'Display Index' (both checked), and a 'View Selector' dropdown set to 'Off'. Below the dropdown is a scrollable list of views: 'Cases Resolved By Me in the last 7 days', 'Cases Resolved in the last 7 days', 'Enhanced Active Cases', and 'My Active Cases'.
- Chart Options:** Includes a 'Default Chart' dropdown set to 'Cases by SLA Status Over Week', a checked 'Show Chart Only' checkbox, and an unchecked 'Display Chart Selection' checkbox.
- Availability:** Includes a checked 'Available on phone' checkbox.

At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background shows a Power Apps dashboard with two charts: 'Cases by SLA Status Over Week' and 'Case Mix (By Priority)'. The dashboard title is 'Customer Service Representative Social Dashboard - Personal'.



# Dashboard Configuration Demo

The screenshot shows the 'Set Properties' dialog for a list or chart component in Power Apps. The dialog is titled 'Set Properties' and has the subtitle 'Set the List or Chart properties.' It is divided into several sections:

- Data Source:** Specifies the primary data source for this list or chart. It includes dropdowns for 'Records' (All Record Types), 'Entity' (Cases), and 'Default View' (My Active Cases).
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# Dashboards

## Configuration of Dashboards

- Creating and configuring dashboards
  - Creating new personal dashboard from existing
    - Save As, Edit
    - Edit and add components
  - **Creating new system dashboard under advance settings**
    - **Advance settings, Solutions**
    - **Create new dashboard**
    - **Edit and add components**
    - **Dashboard level security**
    - **Save and publish**



# Dashboard Configuration Demo

Customer Service Hub **SANDBOX** Try the new look

← Save As + New ▾ Edit Delete ✓ Set As Default Assign Refresh All

### Customer Service Representative Social Dashboar...

#### My Active Cases

Cases by SLA Status Over Week

SLA Status	Count:All (Case)
1	3
2	4
3	3
4	9
5	9

#### All Cases

Case Mix by Incident Type

Incident Type	Count:All (Case)
1	1
2	6
3	6
4	6
5	6
6	4
7	4

#### Active Cases

Case Mix (By Priority)

Priority	Count:All (Case Title)
1	5

### Settings

- General
- About
- Privacy & Cookies
- Legal terms
- More Settings
  - Personalization Settings
  - Advanced Settings**
  - Toast Notification Display Time
- Optional experiences
- Try the new look



# Dashboard Configuration Demo

The screenshot displays the Microsoft Dynamics 365 Power Apps interface. The browser address bar shows the URL: `org0d6ad03f.crm.dynamics.com/tools/solution/edit.aspx?id=%7bc9E03946-3F11-EF11-9F89-6045BDA9790C%7d#`. The page title is "Solution: DCON 2024 - Microsoft Dynamics 365". The main header is "Power Apps" with a "Try New Experience" button. The left sidebar shows the "Solution DCON 2024" tree with "Dashboards" selected. The main content area shows a "Choose Layout" dialog box with the following options:

- 3-Column Regular Dashbo...
- 3-Column Multi-Focused D...
- 4-Column Overview Dash...
- 2-Column Regular Dashbo...
- 3-Column Overview Dash...
- 3-Column Focused Dashb...

The "3-Column Regular Dashboard" option is selected and highlighted. A preview of this layout is shown on the right, featuring a grid of six charts. Below the preview, the text reads: "3-Column Regular Dashboard. This layout can accommodate components across three columns." A "Create" button is located at the bottom right of the dialog. The status bar at the bottom of the dialog shows "1 - 1 of 1 (1 selected)" and "Page 1".



# Dashboard Configuration Demo

SAVE CLOSE PROPERTIES EDIT COMPONENT CHART LIST WEB RESOURCE TIMELINE IFRAME ...


















Solution: DCON 2024

**Dashboard : New**

Name: \*DCON 2024

Section



# Dashboard Configuration Demo

SAVE CLOSE PROPERTIES CHART LIST WEB RESOURCE TIMELINE IFRAME ASSISTANT

Solution: DCON 2024  
**Dashboard : DCON 2024**

Name: \* DCON 2024

Section

**Add Component** [X]

Choose the component that you want to add to the dashboard.

**Record Type**  
Case

**View**  
Active Cases

**Chart**  
Active Cases by Agent

Agent	Count
Aaron H... Owner	23

Add Cancel



# Dashboard Configuration Demo

2024  
: DCON 2024

gent

23

Aaron Howell  
Owner

**Add Component** ×

Choose the component that you want to add to the dashboard.

**Record Type**  Column  Column  Column

Cases

**View**

Active Cases





# REPORTS





# Reports

## Overview of Reports

- **CE Reports**
  - Understanding reports vs views
  - Navigating and understanding reports
    - Walkthrough OOB reports
  - Navigating custom reports
    - Create custom report
    - Updating custom report



# Reports

## Overview of Reports

- **CE Reports**
  - **Understanding reports vs views**
  - Navigating and understanding reports
    - Walkthrough OOB reports
  - Navigating custom reports
    - Create custom report
    - Updating custom report



# Report Overview Demo

Customer	Subject	Status	Status Reason	Case Title	Case Type	Billed Service Units	Priority	
<b>A. Datum Corporation (sample)</b>								
<b>Delivery</b>								
		Active						
		On Hold	Missing parts (sample)	Problem		14	Low	
		<b>Summary</b>					<b>14</b>	
		<b>Summary</b>					<b>14</b>	
<b>Information</b>								
		Active						
		Researching	Operating manual required (sample)	Request		67	Low	
		<b>Summary</b>					<b>67</b>	
		<b>Summary</b>					<b>67</b>	
<b>Maintenance</b>								
		Resolved						
		Problem Solved	Required Service (sample)	Request		45	Normal	
		<b>Summary</b>					<b>45</b>	
		<b>Summary</b>					<b>45</b>	
		<b>Summary</b>					<b>42</b>	
<b>Adventure Works (sample)</b>								
<b>Products</b>								
		Active						
		In Progress	Product feature information required (sample)	Request		68	Low	
		<b>Summary</b>					<b>68</b>	
		<b>Summary</b>					<b>68</b>	
<b>Query</b>								
		Cancelled						
		Cancelled	Need service feature information (sample)	Question		23	Normal	
		<b>Summary</b>					<b>23</b>	
		<b>Summary</b>					<b>23</b>	
		<b>Summary</b>					<b>46</b>	
<b>Alpine Ski House (sample)</b>								

All Cases ▾

Edit columns

Customer ↑ ▾	Subject ▾	Status ▾	Status Reason ▾	Case Title ▾	Case Type ▾
A. Datum Corpor...	Delivery	Active	On Hold	Missing parts (sample)	Problem
A. Datum Corpor...	Information	Active	Researching	Operating manual required (...)	Request
A. Datum Corpor...	Maintenance	Resolved	Problem Solved	Required Service (sample)	Request
Adventure Works ...	Products	Active	In Progress	Product feature information r...	Request
Adventure Works ...	Query	Cancelled	Cancelled	Need service feature informa...	Question
Alpine Ski House ...	Information	Active	In Progress	Contact information request...	Request
Alpine Ski House ...	Delivery	Resolved	Problem Solved	Delivery never arrived (sample)	Problem
Blue Yonder Airlin...	Information	Active	In Progress	Contact information required...	Request
City Power & Ligh...	Delivery	Active	Researching	Defective item delivered (sa...	Problem
Coho Winery (sa...	Products	Active	In Progress	Product information required...	Request
Coho Winery (sa...	Query	Resolved	Information Pr...	Shipment question (sample)	Question
Contoso Pharmac...	Maintenance	Active	Waiting for Det...	Maintenance time informatio...	Question
Contoso Pharmac...	Information	Cancelled	Cancelled	Shipping time information (s...	Question



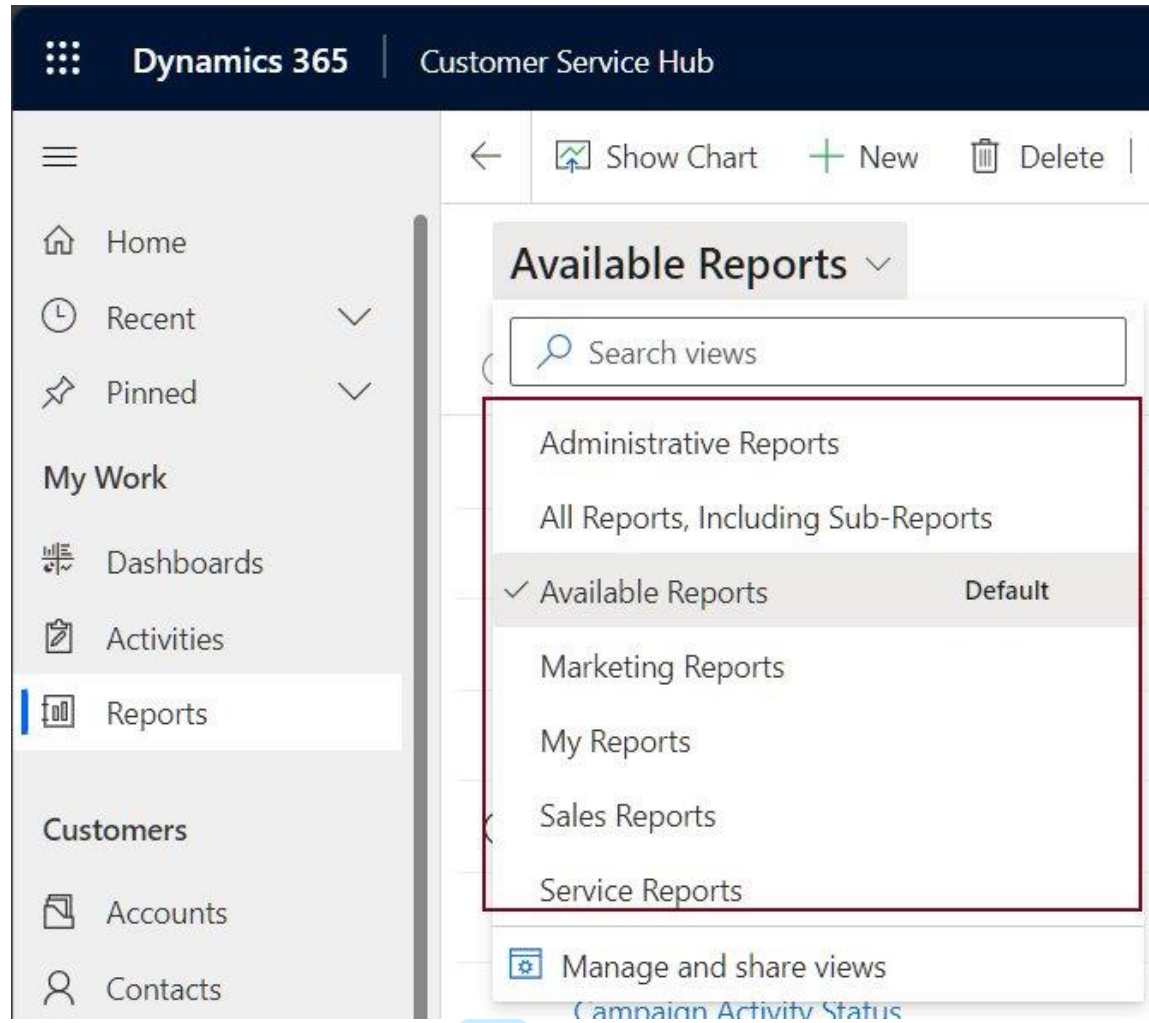
# Reports

## Overview of Reports

- **CE Reports**
  - Understanding reports vs views
  - **Navigating and understanding reports**
    - **Walkthrough OOB reports**
  - Navigating custom reports
    - Create custom report
    - Updating custom report



# Report Overview Demo



The screenshot shows the Dynamics 365 Customer Service Hub interface. The top navigation bar includes the Dynamics 365 logo and the text "Customer Service Hub". On the left, a navigation pane lists "Home", "Recent", "Pinned", "My Work", "Dashboards", "Activities", "Reports" (highlighted), "Customers", "Accounts", and "Contacts". The main content area features a toolbar with "Show Chart", "New", and "Delete" buttons. Below the toolbar is a dropdown menu titled "Available Reports" with a search box labeled "Search views". The dropdown menu lists several report categories: "Administrative Reports", "All Reports, Including Sub-Reports", "Available Reports" (selected and marked as "Default"), "Marketing Reports", "My Reports", "Sales Reports", and "Service Reports". At the bottom of the dropdown is a "Manage and share views" option with a gear icon.






# Report Overview Demo

File

## Report Filtering Criteria

### Cases

 Clear |  Group AND |  Group OR

▼ <a href="#">Status</a>	<a href="#">Equals</a>	<a href="#">Active</a>
▼ <a href="#">Created On</a>	<a href="#">Last X Months</a>	<a href="#">1</a>
▼ <a href="#">Subject</a>	<a href="#">Equals</a>	<a href="#">Enter Value</a>
▼ <a href="#">Product</a>	<a href="#">Equals</a>	<a href="#">Enter Value</a>
▼ <a href="#">Customer</a>	<a href="#">Equals</a>	<a href="#">Enter Value</a>
▼ <a href="#">Owner</a>	<a href="#">Equals</a>	<a href="#">Enter Value</a>

[Select](#)



# Report Overview Demo

Edit Filter

First Horizontal Group:    
 First Vertical Group:    
 Second Horizontal Group:    
 Second Vertical Group:

of 1

## Case Summary Table

### Filter Summary

Status Reason	Data	Aaron Howell	Bridgette Szkalak	Total
In Progress	Count	9	5	14
	Total %	39.13%	21.74%	60.87%
Waiting for Details	Count	1	2	3
	Total %	4.35%	8.70%	13.04%
Researching	Count	3	2	5
	Total %	13.04%	8.70%	21.74%
On Hold	Count	0	1	1
	Total %	0.00%	4.35%	4.35%
Total	Count	13	10	23
	Total %	56.52%	43.48%	100.00%

5/13/2024 1:45 PM

Prepared by: Bridgette Szkalak



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# Report Overview Demo

## Report Filtering Criteria

### Cases

 Clear |  Group AND |  Group OR

▼ <a href="#">Status</a>	<a href="#">Equals</a>	<input type="text" value="Active;Resolved;Cancell"/>	
▼ <a href="#">Created On</a>	<a href="#">Last X Months</a>	<input type="text" value="1"/>	
▼ <a href="#">Subject</a>	<a href="#">Equals</a>	<input type="text" value="Enter Value"/>	
▼ <a href="#">Product</a>	<a href="#">Equals</a>	<input type="text" value="Enter Value"/>	
▼ <a href="#">Customer</a>	<a href="#">Equals</a>	<input type="text" value="Enter Value"/>	
▼ <a href="#">Owner</a>	<a href="#">Equals</a>	<input type="text" value="Enter Value"/>	

[Select](#)





# Report Overview Demo

Edit Filter

First Horizontal Group: Owner | First Vertical Group: Status Reason  
 Second Horizontal Group: (none) | Second Vertical Group: (none)

Navigation: 1 of 1 | 100% | Find | Next

## Case Summary Table

### Filter Summary

Status Reason	Data	Aaron Howell	Bridgette Szkalak	Total
In Progress	Count	9	5	14
	Total %	28.13%	15.63%	43.75%
Waiting for Details	Count	1	2	3
	Total %	3.13%	6.25%	9.38%
Researching	Count	3	2	5
	Total %	9.38%	6.25%	15.63%
Problem Solved	Count	2	3	5
	Total %	6.25%	9.38%	15.63%
Cancelled	Count	1	0	1
	Total %	3.13%	0.00%	3.13%
Information Provided	Count	3	0	3
	Total %	9.38%	0.00%	9.38%
On Hold	Count	0	1	1
	Total %	0.00%	3.13%	3.13%
Total	Count	19	13	32
	Total %	59.38%	40.63%	100.00%

5/13/2024 1:50 PM

Prepared by: Bridgette Szkalak

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# Reports

## Overview of Reports

- **CE Reports**
  - Understanding reports vs views
  - Navigating and understanding reports
    - Walkthrough OOB reports
  - **Navigating custom reports**
    - **Create custom report**
    - **Updating custom report**



# Report Overview Demo

## Report: New Report

Working on solution: Default Solution

General Administration

**Source**

\* Report Type: Report Wizard Report

Click Report Wizard to create or modify the report.

Report Wizard

**Details**

\* Name: Case Details

Description

**Parent Report**

Parent Report

**Categorization**

Categories: Administrative Reports

Related Record Types

Display In: Reports area

Languages: English

## Report: New Report

General Administration

\* Owner: Bridgette Szkalak

\* Viewable By:  Organization  Individual

Created By

Last Modified By



# Report Overview Demo


Report: New Report Working on solution: Default Solution

General Administration

## Get Started Help

Select how to start your report.

**Select the starting point for your report**

- Start a new report
- Start from an existing report  
 
- Overwrite existing report

Back Next Cancel



# Report Overview Demo

## Report Properties

[Help](#)

Enter the name and description of the report, and specify which record types the report will use.

### Specify the name and description of the report

Report name: \*

Report description:

### Specify the record types to include in this report

Your choice for primary record type will determine which related record types can be included.

Primary record type: \*

Related record type:

[Back](#)

[Next](#)

[Cancel](#)



# Report Overview Demo

## Select Records to Include in the Report




[Help](#)

Select a view, or define criteria. This will become the default filter for the report.

### Report Filtering Criteria

#### Cases

Use Saved View: [new] ▼

 Clear |  Group AND |  Group OR

▼ [Modified On](#)      [Last X Days](#)      [30](#)

[Select](#)

Back

Next

Cancel



# Report Overview Demo

## Lay Out Fields

Select the columns, groupings, and totals to display in the report.

Click here to add a grouping

Click here to add a column

### Common Tasks



- Configure
- Add Column or Grouping ...
- Change Properties ...
- Remove Column or Grouping
- Set Top or Bottom Number ...

Back

Next

## Lay Out Fields

Select the columns, groupings, and totals to display in the report.

Customer

Subject

Status

Status Reason	Case Title	Case Type	Billed Service Units
---------------	------------	-----------	----------------------

### Common Tasks



- Configure Sorting
- Add Column or Grouping ...
- Change Properties ...
- Remove Column or Grouping
- Set Top or Bottom Number ...

Back

Next

Cancel

Help



# Report Overview Demo

## Format Report



Select the basic format of the report.

**i** If you want to use a chart in this report, click Back, and then either add a summary type to an existing numeric column, or add a new numeric column with a summary type.

**Table only**



**Chart and table:**

Show table below chart on the same page.



Show chart. To view data for a chart region, click the chart region.



## Format Report

Select the basic format of the report.

**Table only**



**Chart and table:**

Show table below chart on the same page.




Show chart. To view data for a chart region, click the chart region.





# Report Overview Demo

## Report Successfully Created

 [Help](#)

Your report was successfully created. To exit the wizard, click Finish.

Suggested next steps:

- To make sure that the report is displayed where you want it, in the Report form, review the settings in the Categorization section.
- To make sure that the report returns the information that you expect, in the Report form, on the Actions toolbar, click Run Report.



# Q&A



**Thank you for participating!**

**Enjoy the conference!**

