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Fast. Accurate. Anywhere.

Top 10 Best Practices to
Microsoft Dynamics Reporting

1. Identify the needs of your audience

Finance may thrive on detailed information, salespeople may be more visual and manufacturing may require visibility when metrics fall outside of an acceptable range.
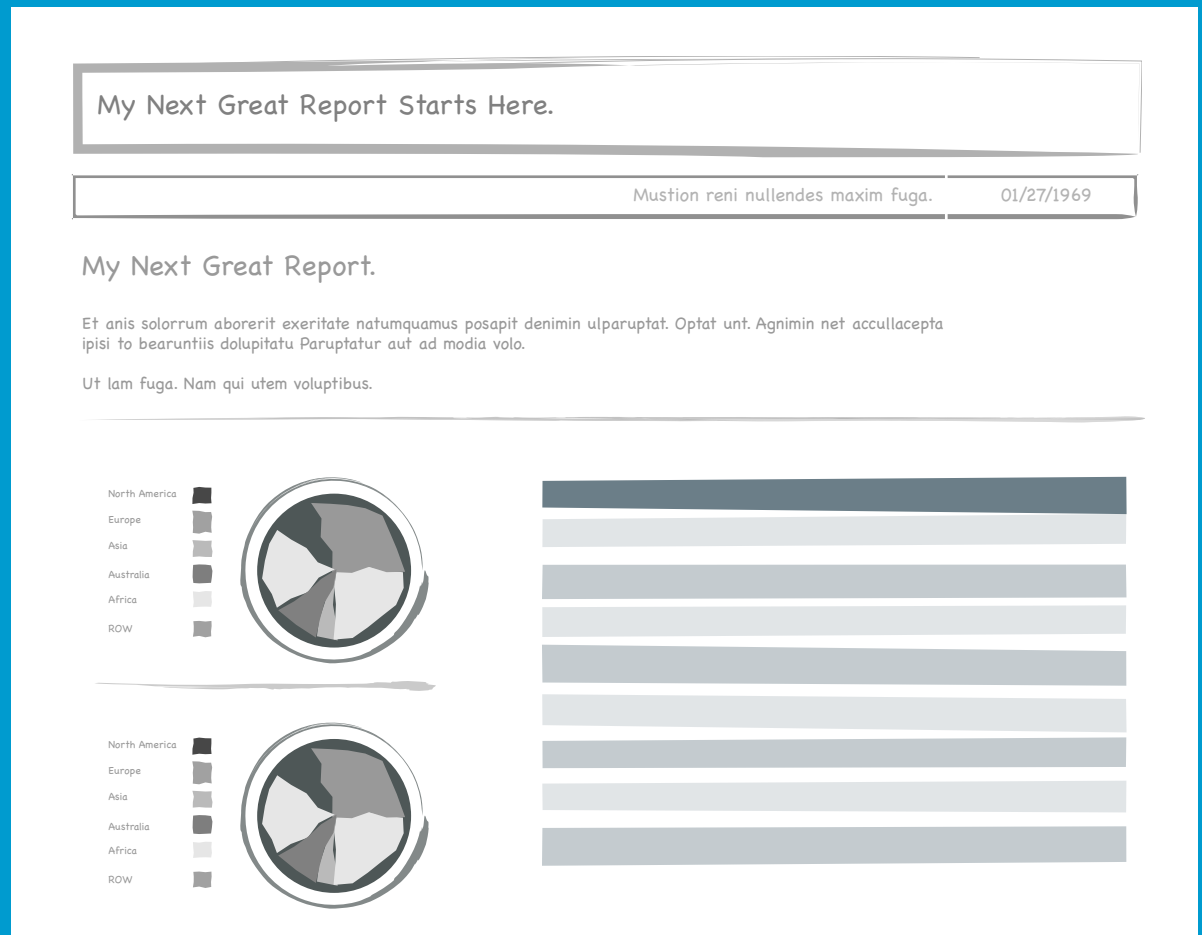
Before you start making a report make sure you know what's important to your audience. Have a quick conversation with the end user about how they plan to use the report to support their daily tasks. You'll be surprised what you find out. You may not have a complete understanding of the report until you ask the correct series of questions. If you're working on a new version of a current report, ask about what could be improved to make the data easier to work with. Watch how the user interacts with the report and think about how you might design the interface for a smoother workflow.
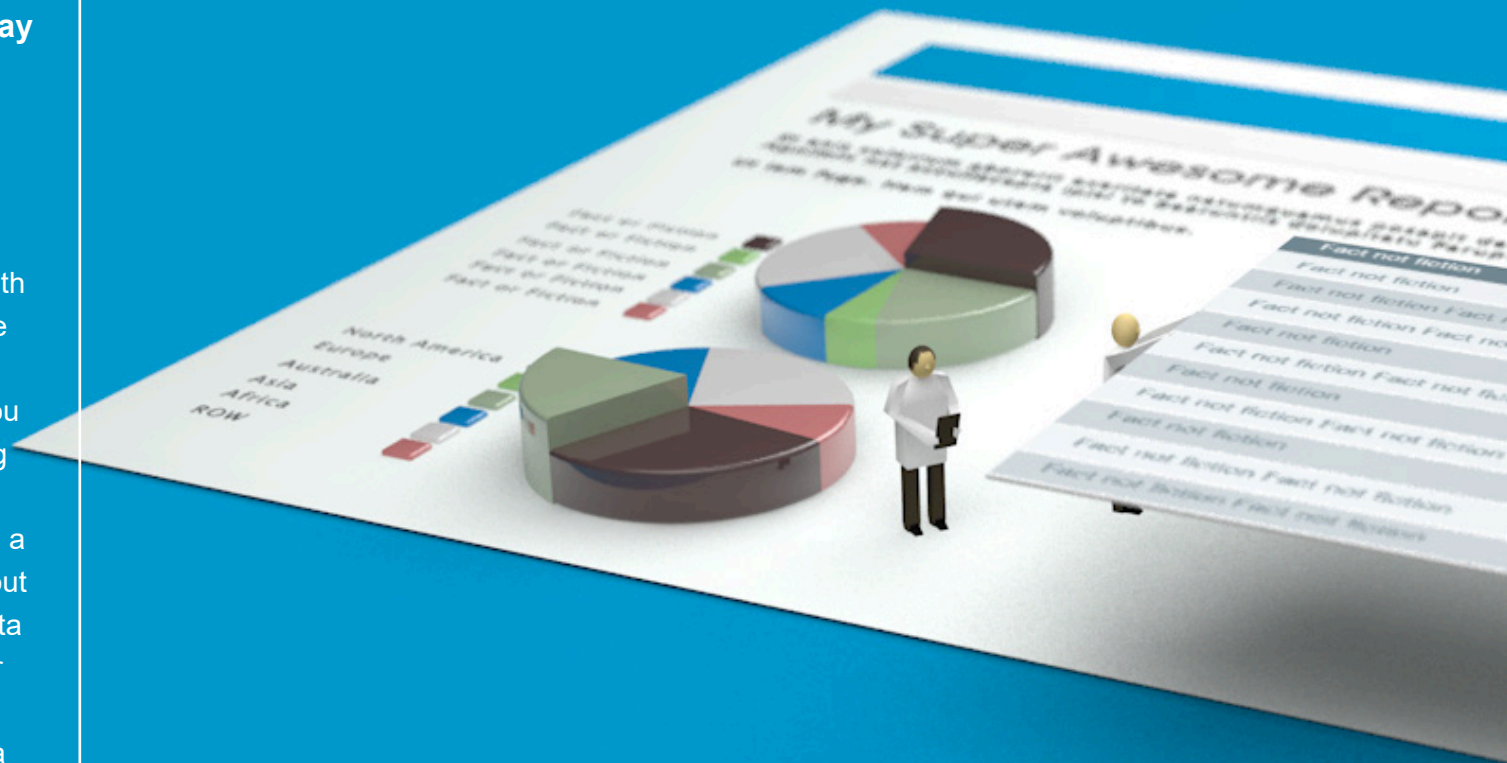
2. Create a report mock-up

All great reports have to begin somewhere, and that somewhere is called the design phase.

We find it helpful to mock-up a report manually or with a simple design in Excel to create a basic layout. Like a sketch before painting a masterpiece, a simple mock-up lets you practice and perfect the overall design outside the constraints of the final medium. The mock-up process helps you visualize and situate key components in a logical and usable way. As you mock-up your design, keep your audience in mind by selecting components, charts and filters they would find interesting and useful. Review your mock-up with your audience to confirm that it meets their needs.

My Next Great Report Starts Here.

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My Next Great Report.

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North America
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3. Label your report intuitively

Consistent labeling conventions help users quickly find what they're looking for, which in turn makes your report more effective.

You may consider creating a header in your report that shows the report title, report options, date and time and a company logo to make it easy to identify and organize your report later. Clearly labeling elements like slicers and charts also makes it easier for users to interact and analyze the data. Between worksheets, stick with similar naming conventions to make cross-worksheet references a breeze.

Label your report intuitively

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Agnimin net accuskapis qui te tempor.

Ut lam fuga. Nam qui atas atuptas.

Top Salespeople

Mia Bakhurts
Christel Watters
Tracy Todd
Moe Stuffing
Ricky Bobby
Tom John

4. Set up report grouping

It's easy to go into information overload with rows and rows of data. Just thinking about it can make your eyes water.

In many large reports, you need to present granular details and a high-level overview at the same time. With report grouping, you can show the detailed information on demand without cluttering up the overall report. Grouping is purely an aesthetic function and you may want to group or ungroup the data in your report depending on your audience. Some users will want the full detail, others would benefit from a more concise view.

To group a set of data in Excel 2007-2013, highlight the rows or columns you want to group and navigate to the data tab in the Excel ribbon and select "group". A keyboard shortcut for grouping is to type Alt + Shift + Right Arrow, which will bring up the grouping dialog box.

5. Take advantage of data analysis and visualization tools

Lucky for you, Excel has introduced a number of tools over the past few versions to help you make your report more interactive.

Report filters are useful for sorting data and can help users uncover trends quickly. Sparklines, introduced by Microsoft in Excel 2010, let you create tiny, colorful charts within a worksheet cell to help you visualize data at a small scale. PivotTables can single-handedly transform a static report into a report that is inherently more useful and dynamic. PivotTables allow you to summarize large sets of data quickly and easily. Users can interact with PivotTables to do simple analysis and uncover new insights. Learn how to get started with Excel PivotTables with this **Quick Tip video!**

6. Make your report interactive

Allow your users to select the information that they want to see in the report.

Microsoft Excel 2010 and later versions offer Slicers as an easy, interactive option for your reports. Slicers include buttons which users can click to filter PivotTable data. In addition to filtering, slicers show the current filtering state, making it easy to understand what exactly is shown in a filtered PivotTable report.

In Jet Professional you can also include Report Options in your reports. This allows your users to set their own filters and refresh the report with the click of a button to get exactly the information they need.

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See How Building Microsoft Dynamics Reports Can Be Easy.

From real-time financial reporting to complete visibility from data warehousing, Jet Report's flexible, easy-to-use products have everything you need to deliver fast, accurate reports.

See for yourself why 11,300 customers from 94 countries trust Jet Reports to manage their Microsoft Dynamics reporting.

WATCH DEMO

7. Use color for emphasis

Just because the information starts out in black and white doesn't mean it should stay that way.

The proper use of color helps users make sense of information quickly. A splash of color will draw the user's eye to important information, but too much color can be distracting.

Use formatting and conditional formatting rules in Excel to highlight data that you want to emphasize. Use muted colors on information that is less important to the user.

Eliminate gridlines in your workbook to give your reports a cleaner look (select "View" from the Excel ribbon and uncheck the box for "Gridlines"). Check out **Microsoft's guidelines for sorting and filtering by color** for some helpful hints.

8. Tune for performance

The way a report is designed can have a tremendous impact on performance, so it pays to be mindful of report performance during the design phase.

Lookup functions can take a while to calculate, depending on the number of cells selected. When using a lookup function, you should be able to achieve a performance increase by sorting selected data by using the SORT function. By changing the "MATCH" type on a lookup function from exact to approximate, you can save calculation time as well. If you're still having issues with lookup performance, try using the MATCH and INDEX functions instead of VLOOKUP and HLOOKUP.

For more in-depth information on improving performance in Microsoft Excel, read this **article on Excel performance** in the MSDN library.

9. Test

Testing the validity of your data calculations and formulas is absolutely critical. Just remember: *your associates and sometimes, your boss will be making strategic business decisions based on the information you provide.*

Ask yourself: 'does this number seem accurate?' when in doubt, run a quick calculation and compare it with the original value to ensure your calculations are correct. Run the report by a co-worker to double check your analysis. Diligence up front will save headaches in the end, especially when dealing with dynamic data sets. In Excel, you can test your formulas using the "evaluate formula" function in the formulas tab. Double check filter operation by changing report filters and running the report.

10. Distribute your report

Reports can be shared and distributed in many ways. They can be printed, parsed in HTML, posted to SharePoint, sent as an Excel workbook or PDF, forwarded through email, shared on Dropbox, etc. Solutions like Jet Enterprise and Jet Professional include scheduling features, which automatically refresh your reports with up-to-the-minute data and distribute them to the proper recipients. This allows you to automate your report distribution and free up your time for more interesting tasks. With so many options, it makes sense to plan the distribution and formatting in a thoughtful way to get your report out to the people who need it most, in a format that works for them. Many times you will want to use different report formats for different people inside and outside of the company, so be sure the distribution fits the scenario, share widely and be happy.

Are you looking for a starting point or an idea for a new report? Visit our template collection of sample reports for Microsoft Dynamics and download complimentary sample reports.

Ready to Adopt These Reporting Best Practices? Get Started with Business Intelligence.

When you're ready to take the next step towards implementing these reporting best practices into your business processes, it's time to consider a business intelligence solution. Business Intelligence is about more than just technology - it's about people, processes, and methodology.

To help you successfully introduce Business Intelligence into your Microsoft Dynamics system, we have identified 9 setbacks to avoid before getting started in our eBook: 9 Fatal Flaws to a Dynamics Business Intelligence Project

Inside this eBook, you will get a deeper understanding of what is involved in adopting a BI solution and how to best prepare for a successful project implementation with minimal risk.

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