

# **Travel Insurance and Registrations System (TIRS)**

Get the data you need:

Workplace, Dashboard and Views

Version 1.0

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# 1 Getting the data you need out of CRM

## 1.1 Views

When you select a work-space (i.e. 'Travel Insurance') in Microsoft Dynamics (hover over Microsoft Dynamics CRM and select the 'Travel Insurance' tile) you will be taken to the default **View** for that work-space. You can switch views by using the **View** drop-down menu found by clicking the downwards arrow next to the View's title. This shows any '**System Views**', plus any '**Personal Views**' you have created.

Height	Location	People	Created On
0.07	1 Wellington Square, OX1 2JA	Velma Kushner	20/02/2013 13:40
1.82	1 Wellington Square, OX1 2JA	Venetta Stalls	20/02/2013 13:40
0.15	1 Wellington Square, OX1 2JA	Kasi Haithcock	20/02/2013 13:40
0.64	Keble Road	Edie Weisgerber	20/02/2013 13:40
0.61	Park End Street, OX1 1HP	Kasi Haithcock	20/02/2013 13:40
0.50	7 Keble Road	Janise Maloy	20/02/2013 13:40

### Selecting a View for a Work-space

Each view may have a different set of search criteria and sometimes, display a different selection of columns.

You can set a particular **View** to be the default by selecting the view you wish to use as the default and then clicking on the pin to the left of its title.

Name	Office	Role
Candra Bentz	Banbury Road	Tree Maint
Cristine Farmer	Banbury Road	Tree Maint

\*You can choose either a '**System View**' or one of your own '**Personal Views**' for this.

## 1.2 Ordering and filtering by Index

You can quickly find records you are interested in by using a combination of the 'Order by' feature and the Alpha Bar at the bottom of the view. For example: if you click on the 'Name of Trip' column in the 'All Active Applications' view it will order the applications alphabetically by that column.

\*You can create sub-sorts on by columns by holding 'SHIFT' as you click on each column title.

Active Insurance Applications Search for records

✓ Name of Trip ↑	Traveller	Start Date	End Date	Created On	Modified On	Department	Division
Afghanistan010518	L G Afghanistan010518	01/05/2018	30/05/2018	25/04/2018 11:28	05/06/2018 16:54	Blavatnik School D Phil Students	Social Sciences
Africa010618	L G Africa010618	01/06/2018	30/06/2018	25/04/2018 10:42	05/06/2018 16:54	Academic Admin Division	UAS
Andorra_042018	K- UAT S-User	11/04/2018	30/04/2018	11/04/2018 09:57	13/04/2018 10:13	History	Humanities
Another workflow test	Tightrope Walker Another workflow t...	24/05/2018	31/05/2018	14/05/2018 16:54	05/06/2018 16:55	Academic Admin Division	UAS
Anthropology Research	Neil Clarke Anthropology Research	04/06/2018	05/06/2019	25/04/2018 10:28	25/04/2018 11:44	School of Anthropology and Museu...	Social Sciences
Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	26/06/2018	25/04/2018 10:55	25/04/2018 11:17	School of Anthropology and Museu...	Social Sciences
Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	01/05/2018	25/04/2018 11:20	25/04/2018 11:26	School of Anthropology and Museu...	Social Sciences
Anthropology Research	Anthropology Research	26/04/2018	30/04/2018	25/04/2018 11:27	25/04/2018 11:27		
Anthropology research	Neil Clarke Anthropology research	25/04/2018	30/04/2018	25/04/2018 13:20	25/04/2018 13:44	Music	Humanities
Anthropology Research	Mark Gunter Anthropology Research	26/04/2018	30/04/2018	25/04/2018 11:28	25/04/2018 11:31		
Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	27/04/2018	25/04/2018 11:33	25/04/2018 11:39	School of Anthropology and Museu...	Social Sciences
Australia - DaveL Proxy 27-Apr	Davey Lloyd Australia - DaveL Proxy ...	01/05/2018	31/05/2018	27/04/2018 14:28	22/05/2018 11:56	Food Technology	UAS
Bangkok	Alex Black Bangkok	09/05/2018	23/05/2018	02/05/2018 10:22	02/05/2018 11:40		
Barbados 042018	Carla Hadland	11/04/2018	30/04/2018	11/04/2018 10:15	11/04/2018 10:42	Music	Humanities

If you then click on the letter 'A' at the bottom of the **View**, you will restrict the list to any records where the Name of Trip begins with 'A'.

Active Insurance Applications Search for records

✓ Name of Trip ↑	Traveller	Start Date	End Date	Created On	Modified On	Department	Division
Afghanistan010518	L G Afghanistan010518	01/05/2018	30/05/2018	25/04/2018 11:28	05/06/2018 16:54	Blavatnik School D Phil Students	Social Sciences
Africa010618	L G Africa010618	01/06/2018	30/06/2018	25/04/2018 10:42	05/06/2018 16:54	Academic Admin Division	UAS
Andorra_042018	K- UAT S-User	11/04/2018	30/04/2018	11/04/2018 09:57	13/04/2018 10:13	History	Humanities
Another workflow test	Tightrope Walker Another workflow t...	24/05/2018	31/05/2018	14/05/2018 16:54	05/06/2018 16:55	Academic Admin Division	UAS
Anthropology Research	Neil Clarke Anthropology Research	04/06/2018	05/06/2019	25/04/2018 10:28	25/04/2018 11:44	School of Anthropology and Museu...	Social Sciences
Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	26/06/2018	25/04/2018 10:55	25/04/2018 11:17	School of Anthropology and Museu...	Social Sciences
Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	01/05/2018	25/04/2018 11:20	25/04/2018 11:26	School of Anthropology and Museu...	Social Sciences
Anthropology Research	Anthropology Research	26/04/2018	30/04/2018	25/04/2018 11:27	25/04/2018 11:27		
Anthropology research	Neil Clarke Anthropology research	25/04/2018	30/04/2018	25/04/2018 13:20	25/04/2018 13:44	Music	Humanities
Anthropology Research	Mark Gunter Anthropology Research	26/04/2018	30/04/2018	25/04/2018 11:28	25/04/2018 11:31		
Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	27/04/2018	25/04/2018 11:33	25/04/2018 11:39	School of Anthropology and Museu...	Social Sciences
Australia - DaveL Proxy 27-Apr	Davey Lloyd Australia - DaveL Proxy ...	01/05/2018	31/05/2018	27/04/2018 14:28	22/05/2018 11:56	Food Technology	UAS

1 - 12 of 12 (0 selected)

All # **A** B C D E F G H I J K L M N O P Q R S T U V W X Y Z

## 1.3 Filters

If you want to reduce the number of records in a specific view, one of the quickest ways to do this is to use Filters.

- To enable Filtering, click the 'Filter' button', which can be found at the end of the column headings row on any View.

- | ✓ Name of Trip ↑               | Traveller                               | Start Date | End Date   | Created On       | Modified On      | Department                          | Division        |
|--------------------------------|---|------------|------------|------------------|------------------|-------------------------------------|-----------------|
| Afghanistan010518              | Reset Filter                            | 05/2018    | 30/05/2018 | 25/04/2018 11:28 | 25/04/2018 14:30 | Blavatnik School D Phil Students    | Social Sciences |
| Africa010618                   | Sort A to Z                             | 06/2018    | 30/06/2018 | 25/04/2018 10:42 | 25/04/2018 10:51 | Academic Admin Division             | UAS             |
| Andorra_042018                 | Sort Z to A                             |            |            |                  |                  |                                     |                 |
| Another workflow test          | Contains Data                           | 04/2018    | 30/04/2018 | 11/04/2018 09:57 | 13/04/2018 10:13 | History                             | Humanities      |
| Anthropology Research          | Contains No Data                        | 05/2018    | 31/05/2018 | 14/05/2018 16:54 | 14/05/2018 16:55 | Academic Admin Division             | UAS             |
| Anthropology Research          | Custom Filter...                        | 06/2018    | 05/06/2019 | 25/04/2018 10:28 | 25/04/2018 11:44 | School of Anthropology and Museu... | Social Sciences |
| Anthropology Research          | Neil Clarke Anthropology Research       | 26/04/2018 | 26/06/2018 | 25/04/2018 10:55 | 25/04/2018 11:17 | School of Anthropology and Museu... | Social Sciences |
| Anthropology Research          | Neil Clarke Anthropology Research       | 26/04/2018 | 01/05/2018 | 25/04/2018 11:20 | 25/04/2018 11:26 | School of Anthropology and Museu... | Social Sciences |
| Anthropology Research          | Anthropology Research                   | 26/04/2018 | 30/04/2018 | 25/04/2018 11:27 | 25/04/2018 11:27 |                                     |                 |
| Anthropology research          | Neil Clarke Anthropology research       | 25/04/2018 | 30/04/2018 | 25/04/2018 13:20 | 25/04/2018 13:44 | Music                               | Humanities      |
| Anthropology Research          | Mark Gunter Anthropology Research       | 26/04/2018 | 30/04/2018 | 25/04/2018 11:28 | 25/04/2018 11:31 |                                     |                 |
| Anthropology Research          | Neil Clarke Anthropology Research       | 26/04/2018 | 27/04/2018 | 25/04/2018 11:33 | 25/04/2018 11:39 | School of Anthropology and Museu... | Social Sciences |
| Australia - Davel Proxy 27-Apr | Davey Lloyd Australia - Davel Proxy ... | 01/05/2018 | 31/05/2018 | 27/04/2018 14:28 | 22/05/2018 11:56 | Food Technology                     | UAS             |
| Bangkok                        | Alex Black Bangkok                      | 09/05/2018 | 23/05/2018 | 02/05/2018 10:22 | 02/05/2018 11:40 |                                     |                 |
| Barbados 042018                | Carla Hadland                           | 11/04/2018 | 30/04/2018 | 11/04/2018 10:15 | 11/04/2018 10:42 | Music                               | Humanities      |

Custom Filters

Show records where Department:

Equals

Music

AND OR

-- Select Operator --

OK Cancel

Microsoft Dynamics CRM | TRAVEL INSURANCE | Applications

[+ NEW](#)
[DELETE](#)
[EMAIL A LINK](#)
[RUN REPORT](#)
[EXPORT TO EXCEL](#)
[IMPORT DATA](#)
[CHART PANE](#)

### Active Insurance Applications

**System Views**

- Active Insurance Applications
- Inactive Insurance Applications

**My Views**

- Applications in Process
- Create Personal View
- Save Filters as New View
- Save Filters to Current View

Traveller	Start Date	End Date	Created On	Modified On	Department
Carla Hadland	11/04/2018	30/04/2018	11/04/2018 10:15	11/04/2018 10:42	Music
Carla Hadland KS - retesting error	31/05/2018	30/06/2018	21/05/2018 19:53	23/05/2018 15:09	Music
Carla Hadland KS - testing risk requir...	25/04/2018	30/04/2018	25/04/2018 20:37	04/06/2018 09:53	Music

\*You can share these saved views with other users, as you can all personal views (See 1.6.1).

## 1.4 Quick Search

A quick way to find a specific record is to use the 'Quick Search' box.

Depending on the record type you are looking at, this box will search through a number of key fields looking for a match. For example, when searching 'All Active Applications, the 'Quick Search box' will search all the field names to find a match. If we search for 'Afghan', it will find applications where either the Name of Trip, Traveller or Destination Country starts with 'Afghan' (see the example below).

Search Results ▾

✓	Name of Trip ↑	Traveller	Start Date	End Date	Created On	Modified On	Department	Division	🔍	🔄
	Afghanistan010518	L G Afghanistan010518	01/05/2018	30/05/2018	25/04/2018 11:28	05/06/2018 16:54	Blavatnik School D Phil Students	Social Sciences		
	Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	26/06/2018	25/04/2018 10:55	25/04/2018 11:17	School of Anthropology and Museu...	Social Sciences		
	Ben's First UAT Trip	Tightrope Walker Ben's First UAT Trip	09/05/2018	31/05/2018	25/04/2018 10:21	05/06/2018 16:55				
	Chris self (not Music) Trip 23-April	Chris M (UAT) Chris self (not Music) T...	22/05/2018	22/06/2018	23/04/2018 14:33	23/04/2018 14:38	Atmospheric, Oceanic and Planetary ...	MPLS		
	Kathy Demo Application UAT 2	Chris M (UAT) Kathy Demo Applicati...	06/05/2018	05/09/2018	02/05/2018 10:09	02/05/2018 10:25				
	Med-Sci Trip to Afghanistan June-18	Chris M (UAT) Med-Sci Trip to Afgha...	01/06/2018	30/06/2018	24/04/2018 11:17	24/04/2018 11:19	Medical Sciences Divisional Office	Medical Sciences		
	Rob's High-Risk Trip (CM Proxy) 23-April	Rob L (UAT) Rob's High-Risk Trip (CM...	26/04/2018	07/06/2018	23/04/2018 12:09	23/04/2018 12:18	Music	Humanities		

By default, the match will be on records where the searched fields start with the search criteria. However, you can use a wildcard (\*) to search for an occurrence of the search criteria anywhere in the field. For example: if you search for 'an' you will just bring back records beginning with 'an' in one of the fields. Whereas if you search for '\*an', you will see all records that contain 'an' anywhere in the fields (see the example below).


Search Results ▾

✓	Name of Trip ↑	Traveller	Start Date	End Date	Created On	Modified On	Department	Division	🔍	🔄
	Afghanistan010518	L G Afghanistan010518	01/05/2018	30/05/2018	25/04/2018 11:28	05/06/2018 16:54	Blavatnik School D Phil Students	Social Sciences		
	Andorra_042018	K- UAT S-User	11/04/2018	30/04/2018	11/04/2018 09:57	13/04/2018 10:13	History	Humanities		
	Another workflow test	Tightrope Walker Another workflow t...	24/05/2018	31/05/2018	14/05/2018 16:54	05/06/2018 16:55	Academic Admin Division	UAS		
	Anthropology Research	Neil Clarke Anthropology Research	04/06/2018	05/06/2019	25/04/2018 10:28	25/04/2018 11:44	School of Anthropology and Museu...	Social Sciences		
	Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	26/06/2018	25/04/2018 10:55	25/04/2018 11:17	School of Anthropology and Museu...	Social Sciences		
	Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	01/05/2018	25/04/2018 11:20	25/04/2018 11:26	School of Anthropology and Museu...	Social Sciences		
	Anthropology Research	Anthropology Research	26/04/2018	30/04/2018	25/04/2018 11:27	25/04/2018 11:27				
	Anthropology research	Neil Clarke Anthropology research	25/04/2018	30/04/2018	25/04/2018 13:20	25/04/2018 13:44	Music	Humanities		
	Anthropology Research	Mark Gunter Anthropology Research	26/04/2018	30/04/2018	25/04/2018 11:28	25/04/2018 11:31				
	Anthropology Research	Neil Clarke Anthropology Research	26/04/2018	27/04/2018	25/04/2018 11:33	25/04/2018 11:39	School of Anthropology and Museu...	Social Sciences		
	Bangkok	Alex Black Bangkok	09/05/2018	23/05/2018	02/05/2018 10:22	02/05/2018 11:40				
	Barbados 042018	Carla Hadland	11/04/2018	30/04/2018	11/04/2018 10:15	11/04/2018 10:42	Music	Humanities		
	Ben's First UAT Trip	Tightrope Walker Ben's First UAT Trip	09/05/2018	31/05/2018	25/04/2018 10:21	05/06/2018 16:55				
	Brittany	Zoe Domas Brittany	08/07/2018	14/07/2018	30/04/2018 14:52	09/05/2018 14:38	Food Technology	UAS		
	Brittany	Zoe Domas Brittany	08/07/2018	14/07/2018	09/05/2018 08:18	09/05/2018 15:43	Food Technology	UAS		

It is important to remember that the results of the 'Quick Search' are NOT related to the view from which the 'Quick Search' was performed. The 'Quick Search' view has been defined separately by the developers and may have different criteria and columns from the view you are currently using. For example, if you are looking at the 'Inactive Trees' view, the Quick Search will not filter inactive trees, but active trees. This can be confusing at first. If the results or the columns displayed by the 'Quick Search' are unsatisfactory please liaise with the support team in order to reach a solution.

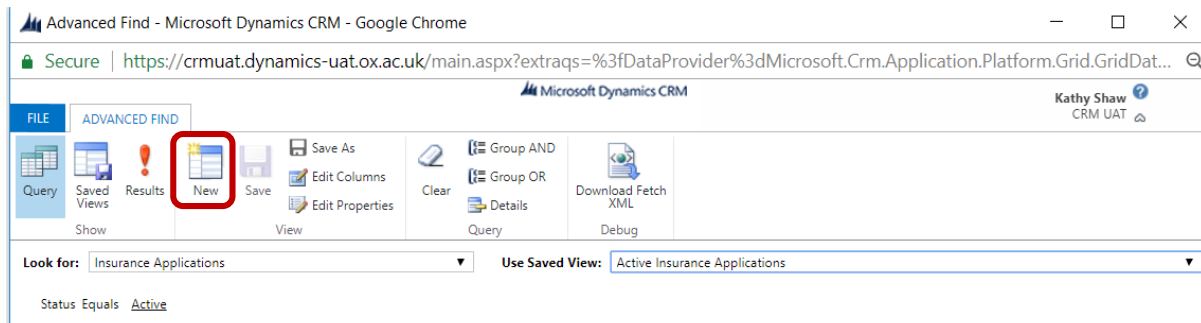
## 1.5 Advanced Find

The 'Advanced Find' functionality allows you to do very specific searches for particular records. It also allows you to determine which columns will be visible in the records that it returns.

- To perform an 'Advanced Find', click the 'Advanced Find' button  in the 'Navigation Bar' within the work-space that you want to perform the search on. This will open the 'Advanced Find' window, here you can enter the criteria you wish to use for your search and also the columns which will be displayed.



- To get started, click the 'New' button in the 'Advanced Find' window.
- It is often a good idea to base your query on an existing search, as this may have at least some of the criteria and/or columns you want to use in your search. To do this, use the drop-down arrows to select a saved view.



Whether you build your new search from scratch or use an existing View, the next thing to do is to add the search criteria you want to use (an existing view will limit the parameters by which you can search).

- Click 'select' to choose the parameter by which you want to filter, then select the condition by which you wish to filter (i.e. 'Equals', 'Contains Data', 'Does not Contain Data', *et cetera*). Depending on the condition selected you may also specify a value for that parameter.

FILE ADVANCED FIND CRM UAT

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Show View Query Debug

Look for: Insurance Applications Use Saved View: [new]

▼ Status Equals Active

▼ Status Reason Equals Submitted

▼ Department Equals Music

Select

### 1.5.1 Grouping Search Criteria

Criteria can also be 'grouped' together using operand conditions.

- To group criteria, you must first select the criteria you want to group by clicking the little black arrow that appears next to the parameter title and choosing the 'Select Row' option from the drop-down menu.

Microsoft Dynamics CRM Test CRM8 CRMTraining2015

FILE ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Show View Query Debug

Look for: Trees Use Saved View: [new]

▼ Status Equals Active

▼ Girth Is Greater Than 0.50

▼ Genus Equals Abies:Alnus:Gymnocladus

Select Row Contains \*Banbury

Hide in Simple Mode Select Row

Delete

- Once you have selected the rows that you want to group you can then choose 'Group AND' or 'Group OR' to create the group. The example below will return only active records that meet all the criteria as specified (applications for the Music department with a status reason of submitted).

FILE ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Show View Query Debug

Look for: Trees Use Saved View: [new]

▼ Status Equals Active

▼ AND ▼ Girth Is Greater Than 0.50

▼ Genus Equals Abies:Alnus:Gymnocladus

▼ Location Contains \*Banbury

Select

### 1.5.2 Adding Columns from related Work-spaces

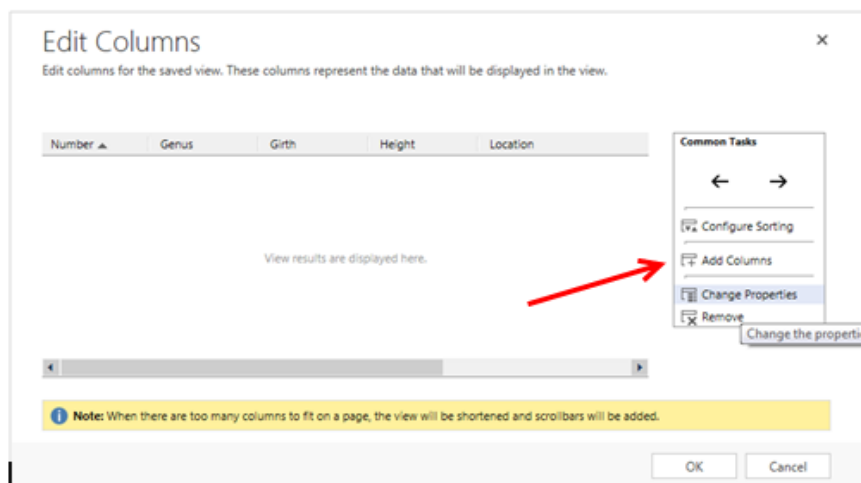


The search criteria you choose for a particular work-space can also be made to include results from any related work-spaces. For example: when searching tree records, you can also add columns to the search results from any related work spaces.

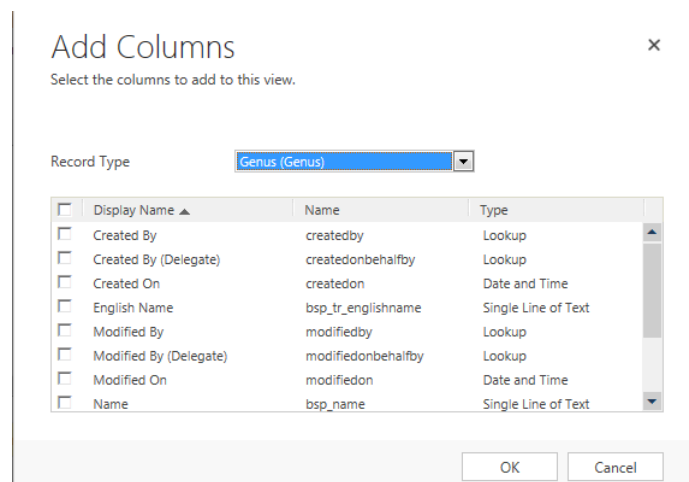
- Within the 'Advance Find' window select 'Edit Columns'.



- Then select 'Add Columns'.



- Select the columns you wish to display in the search results and then click 'OK'. Then run the search.



- The resultant list now includes the additional column(s), in this case the 'English Name'.

Number	English Name (G...)	Genus	Girth	Height	Location	People
00002	Firs	Abies	1.82	3.50	1 Wellington Square, OX1 2JA	Venetta Stalis
00004	Laburnum	Laburnum	0.64	14.63	Keble Road	Edie Weisgerber
00005	Angelica	Aralia	0.61	7.17	Park End Street, OX1 1HP	Kasi Haithcock
00007	Allanthus	Allanthus	1.61	5.59	60 Banbury Road	Venetta Stalis
00008	Catalpas	Catalpa	1.96	4.01	7 Keble Road	Madeline Deer
00009	Zanthoxylum	Zanthoxylum	0.70	14.37	Science Area	Eldridge Rising
00010	Bayberry	Myrica	0.69	8.04	Parks Road/Banbury Road	Merlin Coombe
00011	Sassafras	Sassafras	1.24	14.83	43 Banbury Road	Janise Maloy
00012	Alders	Ainus	0.71	7.79	61 Banbury Road	Liz Hartley
00013	Bald-cypress	Taxodium	0.77	8.53	4 Keble Road	Kasi Haithcock
00014	Ashes	Fraxinus	0.69	12.33	South Parks Road	Kenyatta Hansley
00015	Cedars/Arbonit...	Thuja	1.48	1.00	Ewert House, Ewert Place, OX2 7DD	Kimiko Merriwe...
00016	Sumacs	Rhus	1.65	2.23	Mansfield Road, OX1 3TB	Merlin Coombe

### 1.5.3 Filtering on Columns from Related Work-spaces

Using 'Advanced Find' it is also possible to filter your results using column data form related work-spaces.

- To do this click on 'Select' and select the related work-space from the drop-down menu ('Genus' has been selected in the below example).

Look for: Trees Use Saved View: Active Trees

Status Equals Active

Select

Genus

English Name Contains Redbud

Select

- Now you can click on the three options below to specify the column, the operand condition and the value by which you want to filter your results ('English Name', 'Contains' and 'Redbud' have been used in the example below).

Look for: Trees Use Saved View: Active Trees

Status Equals Active

Select

Genus

English Name Contains Redbud

Select

Now clicking the 'Results' button as before will run the 'Advanced Find', only this time it will return results as filtered by your selected criteria.

#### **1.5.4 Which related work-spaces can be linked to?**

Microsoft Dynamics determines which related work-spaces will be available when creating searches or views (as well as elsewhere, such as workflows).

When creating searches it is only possible to query data that is above the current work-space in the hierarchy. This is because the search needs to be sure that it will only find one record to match the criteria. So when dealing with trees, you can always be sure who the owner is, but when dealing with owners, the query might return more than one tree.

Put another way, Microsoft Dynamics will only ever return a single row for the work-space you are looking at. So if you are looking at owners it will only ever bring back one row for each owner even if the owner has more than one tree. Conversely, a tree can only have one owner, so there's no problem retrieving data related to owners when you are querying trees.

For this reason, it's always best to start as far down the hierarchy as you will need your data to come from. For example: if your query involves data about maintenance and location, start at the survey work-space and query 'upwards'.

#### **1.5.5 Saving Advanced Find Views**

If you wish to save your 'Advanced Find' definitions so that you can use it again another day, click the 'Save As' button. Your query will now be available in the Views drop-down menu under 'Personal Views', and also in the 'Saved Views' section of the 'Advanced View' builder. It will be visible anywhere it is possible to select a different view, such as in look-up dialogue boxes and in 'Associated Views' in forms.

\*If your view does not appear immediately in the drop-down list, simply click on a different work-space and then back to the one you are looking at to refresh the list of Views available.

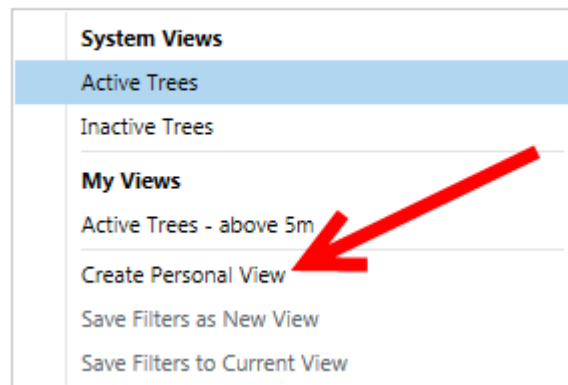
### **1.6 Personal Views**

When you save an 'Advanced Find' view definition, this becomes available to you in the list of views for a work-space.

Personal Views can be created by:

- Using Filters on a view and then pressing 'Save As' as described in the Filters section above.
- Saving an 'Advanced Find' search (as described above).
- Clicking on the 'Create Personal View' link on the View drop-down menu (as below).

## ➔ Active Trees ▾



Either of these last two options will open the 'Advanced Find' screen, in which search criteria and other options can be set.

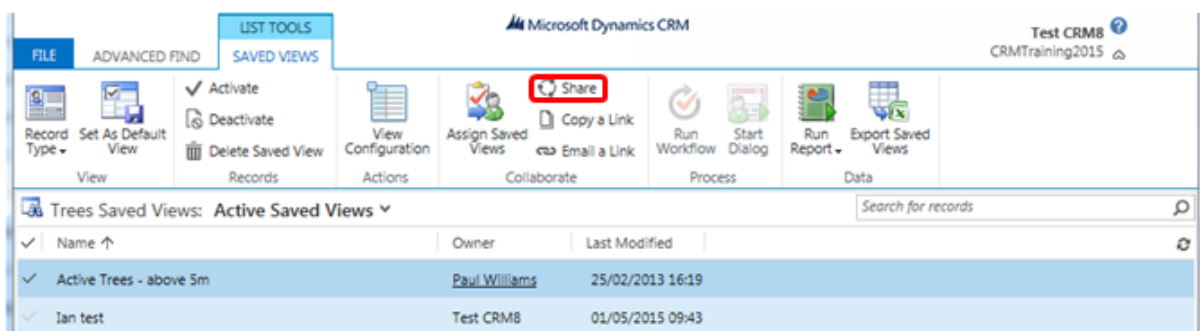
### 1.6.1 Sharing or Deleting a Personal view

Personal Views can be managed through the 'Advanced Find' window.

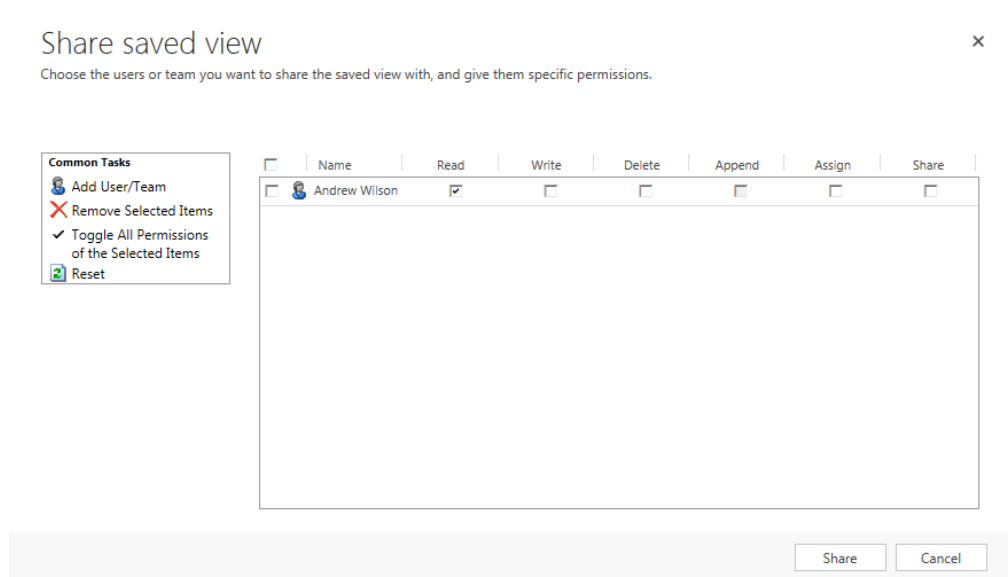
- First open the 'Advanced Find' window (make sure you have selected the work-space in which you created the view). Click the 'Saved Views' button.



- You will see a list of your 'Personal Views' for this work-space.



- Select the View or Views you want to manage by checking the tick next to them. You can either delete them or share them. Clicking share will bring up the following dialogue box:




- Here you can see who the view is shared with, and what they are allowed to do with that view (**the permissions granted here only affect the view, not the data**). You can select additional users to share with by clicking on the Add User/Team button.

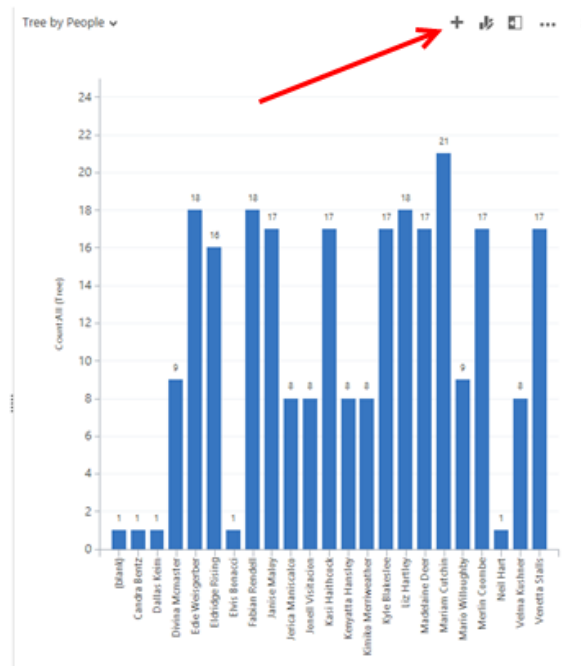
## 1.7 Creating Charts

It is possible to create your own charts in Microsoft Dynamics. These can provide a useful visualisation of your data and are dynamically linked to the views you use so that the charts are updated to reflect any filtering that you may have applied.

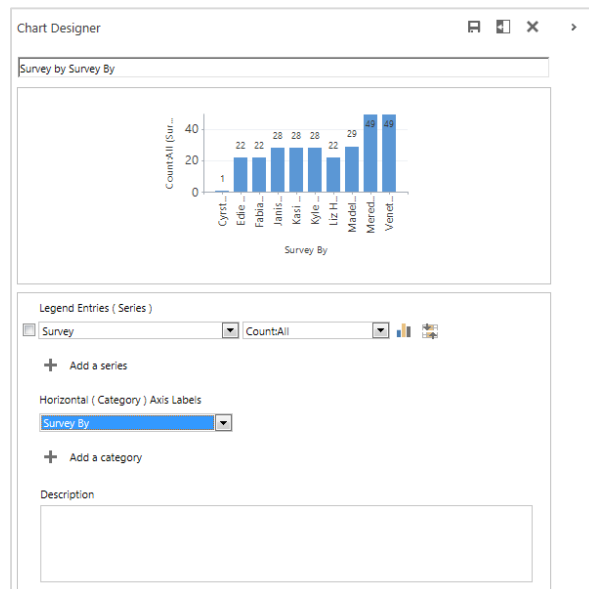
- Expand the 'Chart Pane' (minimised on the right-hand side of any view).

Number	Genus	Girth	Height	Location	People	Created On
00001	Crataegus	0.07	3.58	1 Wellington Square, OX1 2JA	Veima Kushner	20/02/2013 13:40
00002	Abies	1.82	3.50	1 Wellington Square, OX1 2JA	Venetta Stalls	20/02/2013 13:40
00003	Populus	0.15	10.38	1 Wellington Square, OX1 2JA	Kasi Halthcock	20/02/2013 13:40
00004	Laburnum	0.64	14.63	Keble Road	Edie Weisgerber	20/02/2013 13:40
00005	Aralia	0.61	7.17	Park End Street, OX1 1HP	Kasi Halthcock	20/02/2013 13:40
00006	Platanus	0.50	10.14	7 Keble Road	Janise Maloy	20/02/2013 13:40
00007	Allanthus	1.61	5.59	60 Banbury Road	Venetta Stalls	20/02/2013 13:40
00008	Catalpa	1.96	4.01	7 Keble Road	Madeleine Deer	20/02/2013 13:40
00009	Zanthoxylum	0.70	14.37	Science Area	Eldridge Rising	20/02/2013 13:40
00010	Myrica	0.69	8.04	Parks Road/Banbury Road	Merlin Coombe	20/02/2013 13:40
00011	Sassafras	1.24	14.83	43 Banbury Road	Janise Maloy	20/02/2013 13:40
00012	Alnus	0.71	7.79	61 Banbury Road	Liz Hartley	20/02/2013 13:40
00013	Taxodium	0.77	8.53	4 Keble Road	Kasi Halthcock	20/02/2013 13:40
00014	Fraxinus	0.69	12.33	South Parks Road	Kenyatta Hansley	20/02/2013 13:40
00015	Thuja	1.48	1.00	Ewert House, Ewert Place, OX2 7DD	Kimiko Merriwe...	20/02/2013 13:40
00016	Rhus	1.65	2.23	Mansfield Road, OX1 3TB	Merlin Coombe	20/02/2013 13:40

- This will present a chart of the entity that is currently active within Microsoft Dynamics.
- Click on the  button to open the Chart Designer.



- Here you can select the columns which you want to base your chart on. For example: if you want a chart showing how many surveys completed by people you would make the following selection:

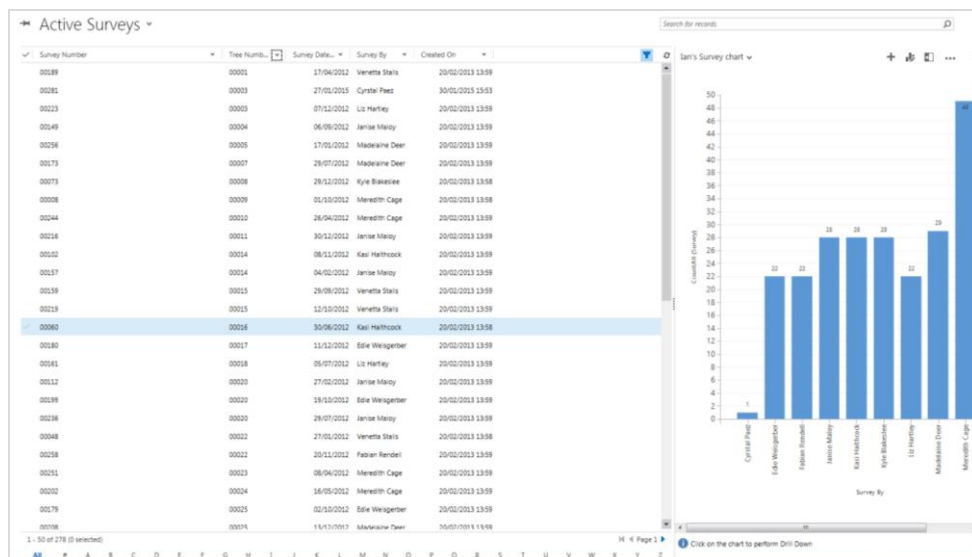


- Depending on the type of column selected, you can aggregate by Average, Min/Max as well as Count. For example, the above section shows the Count of survey by people. \*You can also choose different chart types (pie charts *et cetera*).
- Once you've defined the chart as you require you can then save the report (you might want to change the default name which Microsoft Dynamics has suggested for you) and close the designer.

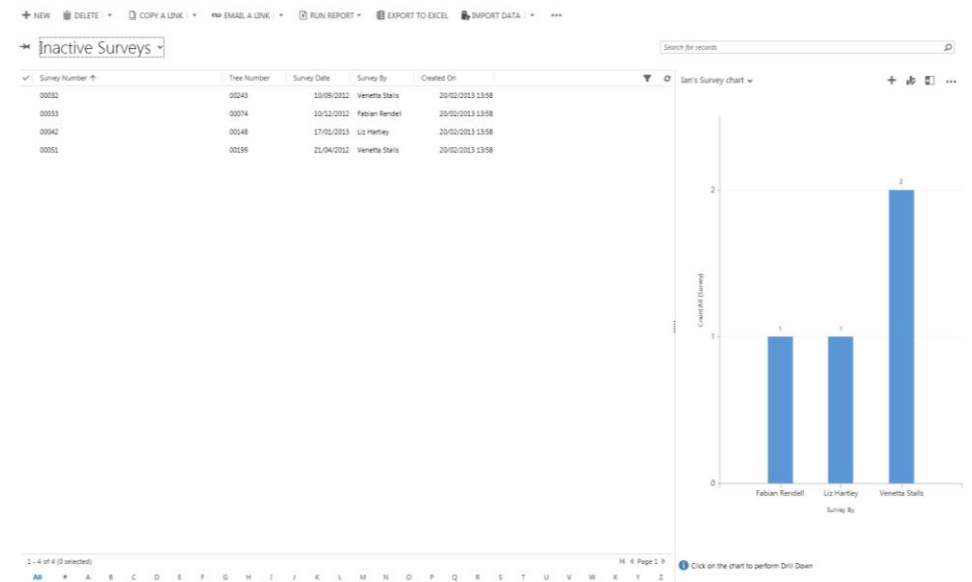
## 1.7.1 Using Charts

Your saved charts will be visible in the 'Chart Pane' for the work-space on which the chart is based. You will notice that the chart and the view interact with each other.

If you change the View in the View drop-down menu whilst a chart is open, the chart will update to report on the records in that view. For example: if you switch between the 'Active Surveys' and 'Inactive Surveys' views, the chart will update based on those different selections.

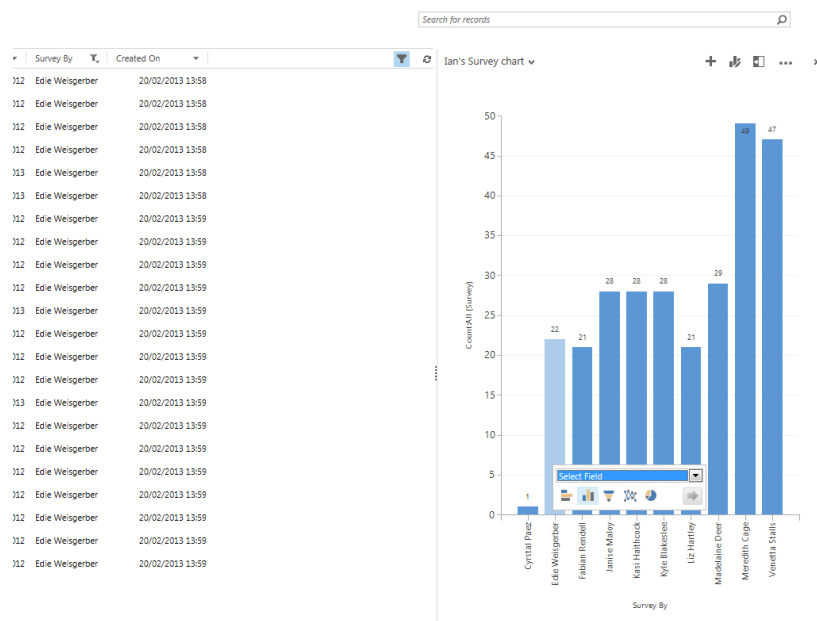


A chart based on the records in the Surveys



...is updated to a chart based on the records in the Inactive Surveys list

Furthermore, if you select any of the groups of records in the chart, the records displayed in the view will be updated accordingly. For example: clicking on the column Edie Weisgerber in the chart below will restrict the records in the view to those that include the Surveys where completed by her.

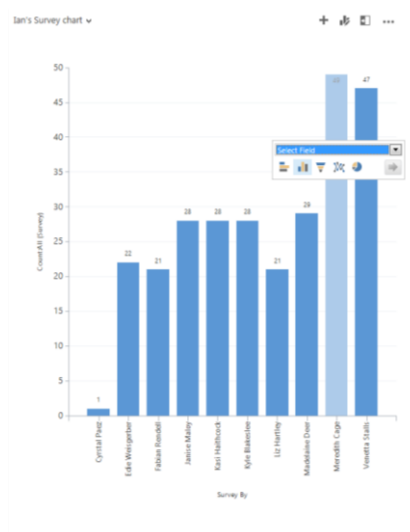


### Selecting a bar in the chart causes the data to be filtered

### 1.7.2 Using Drill Down in Charts

You can Drill Down into a particular group of records in a chart in order to see more details.

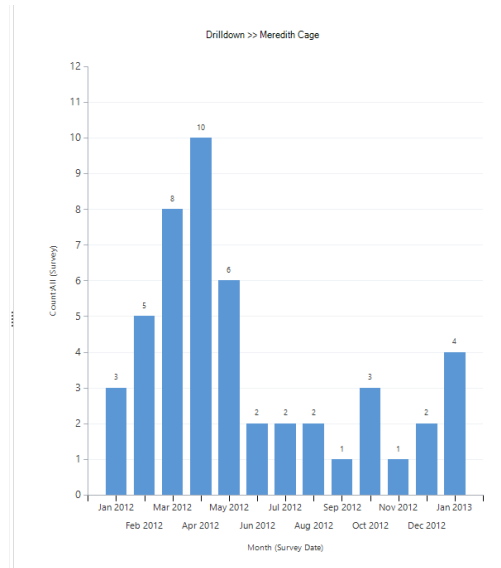
- To do this, you click on one of the 'Bars' representing a group of records.
- Then select a field by which you want to drill down. Then select a chart type and then press the blue arrow to Drill Down.



## Getting ready to Drill Down



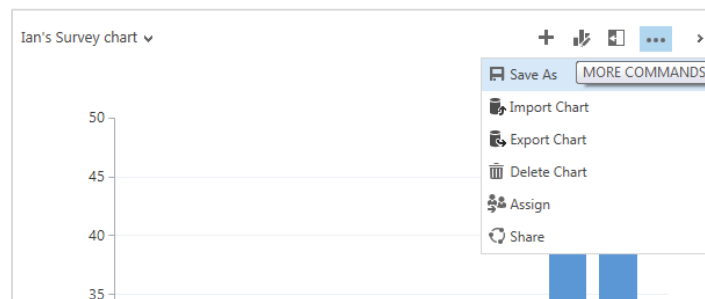
- A new chart will be displayed, showing you the data you have drilled into.



Drilled Down – Meredith Cage surveys by month

### 1.7.3 Sharing or Deleting Charts

- Charts can be shared with colleagues by selecting the 'MORE COMMANDS' option in the chart pane area and clicking on the 'Share' option.
- Charts can be deleted by pressing the Delete Chart button.

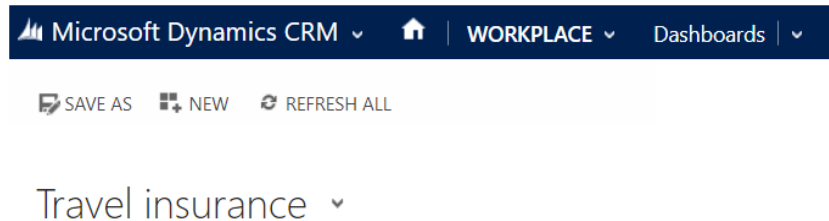


Sharing or deleting charts

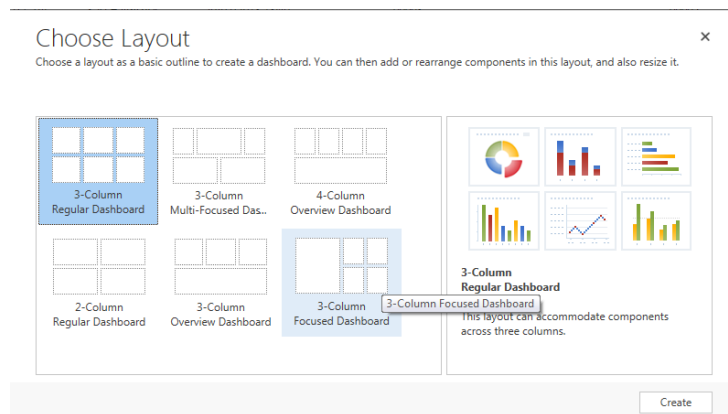
## 1.8 Dashboards

You can create a personalised dashboard to bring together different views and charts in one place. You can create multiple dashboards for different purposes and you can share your dashboards with other colleagues. You can choose a specific dashboard to be your default dashboard.

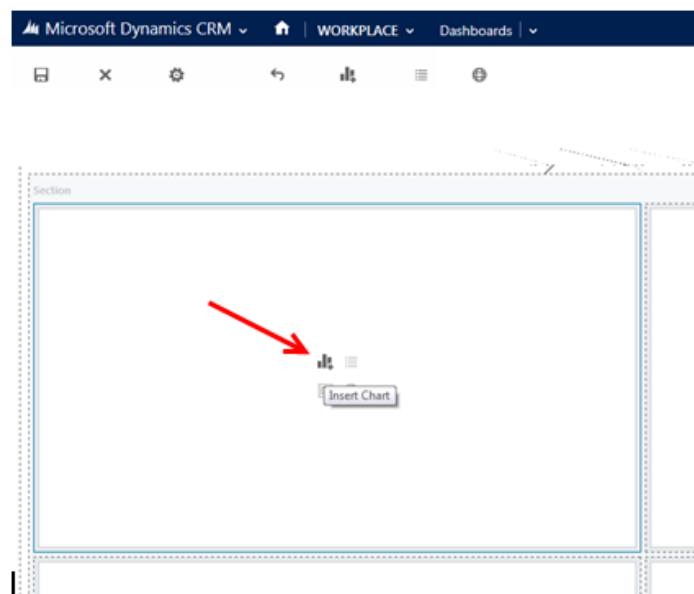
- To create a new dashboard, go to Workplace and have your Dashboard on screen. Click 'NEW'.



- This will bring up the Choose layout dialogue box.



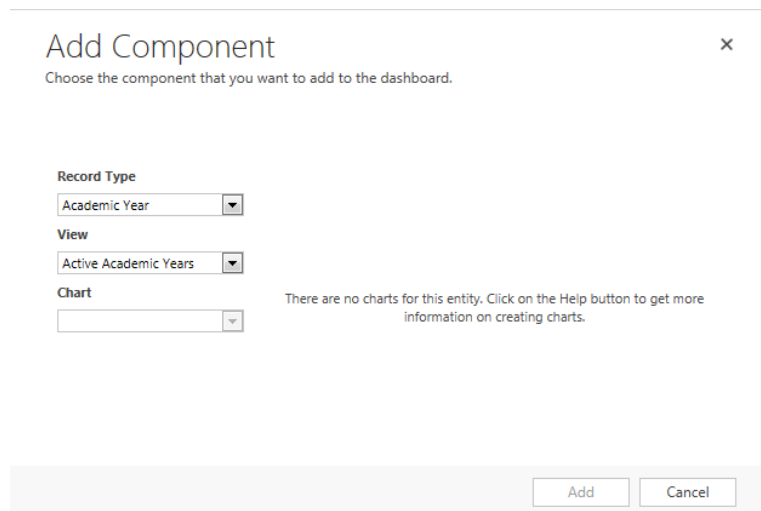
- Choose a dashboard template as your starting point.
- Click on one of the icons in each section to choose the type of component you want to add.



You will probably want to add a chart or a List (a View).

\*There is also an option to add in an Iframe (which can give you a frame from a website). This not something that you would ever expect to use in Microsoft Dynamics however, if you do need an iFrame (System Dashboards only) the sup team can be contacted to add it for you.

- Clicking on either the add chart or list (View) buttons will bring up the 'Add Component' window.



- From here you will be able to specify the record, view and chart types (if applicable) that will constitute the component you are adding.

\*You can also add/delete panes and resize them. Once you've finished, give your dashboard a name and save it.