Report Style Guide

Table of Contents

Introduction

The Style Guide provides you with the style specifications required to write custom reports that have a similar look to standard Microsoft CRM reports.

Headers and Footers

Consider adding a report header, page header, report footer, and page footer to your reports. The report header and footers should contain summary information. Additionally, grouped reports should contain a header and footer for each group section with related summary information.

Report and Page Header

Report and page headers are identical except page headers do not contain summary information. The report header contains the following information:

- The name of the report.
- Group and detail summary values.

An example of a report header is shown in the figure below.

The page header contains only the report name and appears on all pages except the first page, as shown in the following figure.

Note that you cannot always align items in headers with items in tables located in the body of the report. Reports that ship with Microsoft CRM use a rectangle with a static width and standard background color for the header.

The following table summarizes the colors, fonts, and other visual styles for the report and page headers.

Section Name	Background Color (RGB) (Hex)	Foreground Color	Font	Border	Height
Report/Page Header	222,221,207 #DEDDCF	Black	Tahoma 14pt bold	None	.5 inches
Report Header summary text	222,221,207 #DEDDCF	102,102,102 #666666	Verdana 8 pt bold italic	None	Varies

Page Footer

All reports have a page footer that contains the following information:

- Date and time at which the report was generated.
- Network UserID for the user who ran the report.
- Page number and total page count.

| 10/25/2005 3:04 PM | Prepared by: First name Last name | Page 1 of 1 |

Footer Properties

The following table summarizes the footer properties.

Section Name	Background Color (RGB) (Hex)	Foreground Color	Font	Border	Height
Page Footer	222,221,207 #DEDDCF	102,102,102 #666666	Tahoma 8 pt bold	None	.28125

Because Reporting Services does not allow field expressions in the page header or footer, the data-driven formatting expressions are contained in hidden text boxes in the report body. Refer to the textbox specifications in the table below to obtain the format string data values.

Textbox	Source	Expression	Alignment
txtDateTimeFormat (hidden)	(system date and time formats from FilteredOrganization view)	`=First(Fields!dateformatstring.Value, "Formats") & " " & First(Fields!timeformatstring.Value, "Formats")`	N/A
txtTimestamp (footer textbox)		`=Format(Now(), ReportItems!txtDateTimeFormat.Value)`	Left
txtUsername (footer textbox)	UserInfo dataset Field = fullname	`="Prepared by: " & First(Fields!fullname.Value, "UserInfo")`	Center
txtPageCount (footer textbox)	Page <PageNumber> / <TotalPages> (#,##0)	`="Page " & Format(Globals!PageNumber, "#,##0") & " / " & Format(Globals!TotalPages, "#,##0")`	Right

An alternate approach is to use parameters to store formatting information.

Filter Summary

The filter summary is passed to each report as text in a hidden parameter called CRM_FilterText. This text is displayed in a single text box in the report header. The text box is placed within a rectangle in the report header area, set to the width of the report. The rectangle and text box will grow vertically to accommodate the filter text. The filter text area may be collapsed or expanded, using the heading textbox as the drill-down toggle item, and is collapsed by default.

Object	Font	Background Color
Rectangle (set to report width)	N/A	#DEDDCF
Title text box	Tahoma 12 bold, black #313336	Transparent
FilterText text box	Tahoma 8 bold, black #313336	Transparent

Report and Page Layout

All report types except matrix reports are designed for printing. The matrix report's header and footer labeling fit in portrait layout. The matrix content may extend beyond the boundaries of the printed page.

Page Orientation

Reports are oriented for either portrait or landscape to fit both US letter and European A4 paper sizes. This equates to approximately 8.25 X 11 inches. With .5 inch margins, the printable page area is approximately 7.25 X 10 inches. These property settings are summarized in the following table.

Property	Values(s)
PageSize.Width (portrait)	8.25in
PageSize.Width (landscape)	11in
Margins.Left	0.5in
Margins.Right	0.5in
Margins.Top	0.5in
Margins.Bottom	0.5in
GridSpacing	0.03125in

Report Types

Microsoft CRM supports the creation of the following four report types:

- Column List Reports
- Table List Reports
- Matrix Reports
- Chart Reports

The next sections detail each report type and provide formatting standards.

Column List Reports

This is the simplest form of report where records are displayed in rows. Typically, there is just one row per record. The number of columns per record is fixed. The column names are displayed in the first row called the column header. Up to two levels for grouping are supported for these types of reports.

Below are some samples of column list reports.

Column List Report with No Grouping

The following figure shows a column list report with no grouping.

Title	Date Created	Date Modified ▼	Modified By	Customer	Owner
CRM Report Standard - no group column table				Cases:	10
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828
01/17/2005 4:24 PM		Prepared by: CRMSANDMAN\pturley			Page 1 of 1

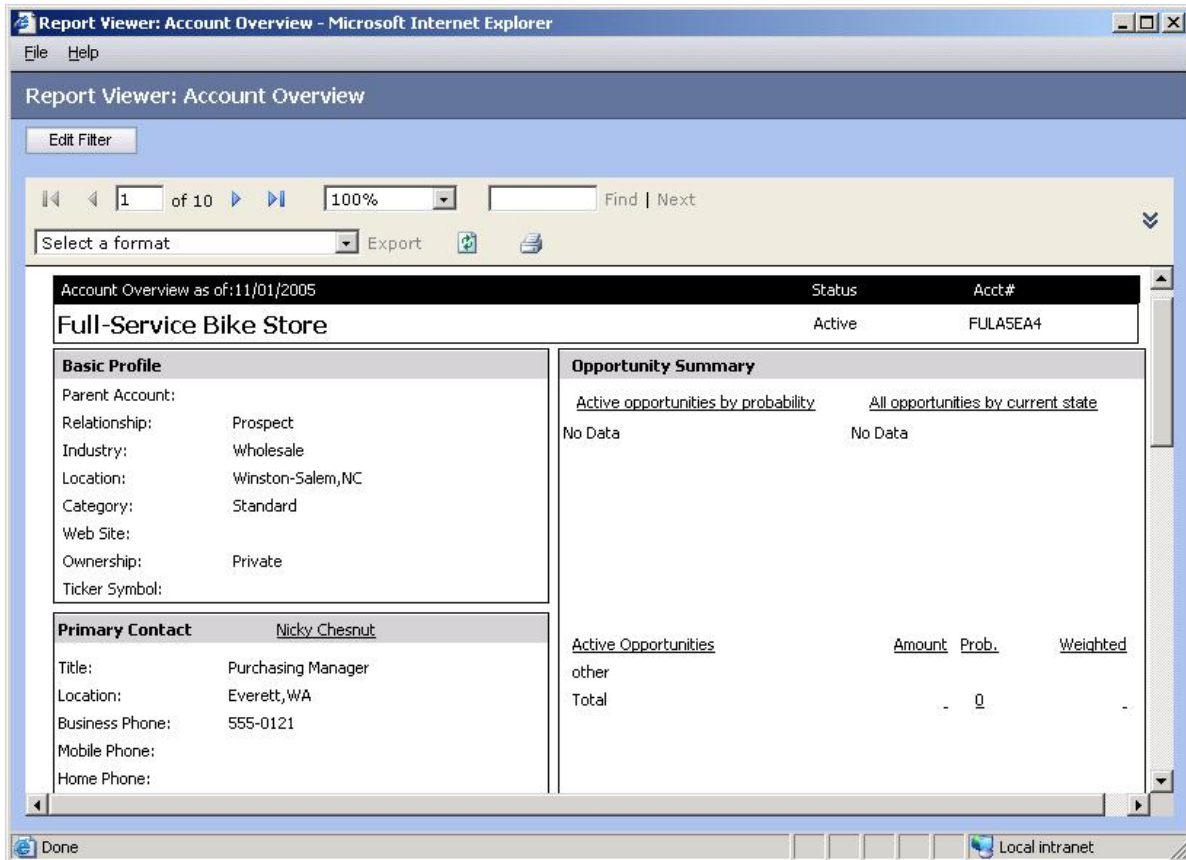## Column List Report with One Level of Grouping

The following figure shows a single-level grouped report with drill-down. The user can select a different group by clicking on the arrow in the Title column header. The report is shown with the drill-down group section expanded.

| CRM Report Standard - 1 level group column table | | | | Owners: | 1 | |
| | | | | Cases: | 10 | |

□ Owner: a_user71828, a_user71828 — Cases: 10

Title ▼	Date Created	Date Modified	Modified By	Customer	Owner	Status Reason
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	On Hold
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Problem Solved
Defective bike - cracked frame	12/13/2004	12/13/2004	Turley, Paul	Friendly Neighborhood Bikes	a_user71828, a_user71828	Researching

| 12/17/2004 3:54 PM | Prepared by: CRMSANDMAN\pturley | Page 1 of 1 |

Table List Reports

A table list report is used when the fields for a report section will not fit into columns. Some multi-level group reports will have a table list group section followed by a related column list group.

The following figure shows a table list report with multiple column list sections. Because of column and row space resizing behavior in Reporting Services HTML rendering, this format will be approximate when rendered.

Note that you cannot always align items in headers with items in tables located in the body of the report. Reports that ship with Microsoft CRM use a rectangle of a standard color with a static width in the header. As the page header and report body grow to fit expanding columns, the report body does not. This is the behavior of Reporting Services HTML rendering.

Table List and Column List Report Formatting Information

Section Name	Background Color (RGB) (Hex)	Foreground Color	Font	Border	Height
Report/Page Header	222,221,207 #DEDDCF	Black	Tahoma 14 pt Bold	None	.5 in
Report Header summary text	222,221,207 #DEDDCF	102, 102, 102 #666666	Verdana 8 pt bold italic	None	Varies
Filter Text Summary (Heading label)	222,221,207 #DEDDCF	49, 51, 54 #313336	Tahoma 10pt bold	None	Varies
Filter Text Summary (Summary text)	222,221,207 #DEDDCF	49, 51, 54 #313336	Tahoma 8 pt bold	None	Varies
Top-level	4,9,15	White	Tahoma 9 pt	None	.40625 in

Group Header	#04090F		Bold		
Top-level Group Header summary text	4,9,15 #04090F	89, 147, 237 #5993ED	Verdana 8 pt bold italic	None	Varies
Second-level Group Header	46,69,110 #2E456E	White	Tahoma 9 pt Bold	None	.40625 in
Second-level Group Header summary text	46,69,110 #2E456E	146, 176, 223 #92B0DF	Verdana 8 pt bold italic	None	Varies
Third-level Group Header	151,156,164 #979CA4	White	Tahoma 9 pt bold	None	.40625 in
Third-level Group Header summary text	151,156,164 #979CA4	222, 222, 222 #DEDEDE	Verdana 8 pt bold italic	None	Varies
Table List Section Detail	White	18, 42, 73 #122A49	Tahoma 8 pt	233, 233, 233 #E9E9E9	Varies
Nested Column List Header	233,233,233 #E9E9E9	18, 42, 73 #122A49	Tahoma 8 pt bold	Bottom #ADADAD	.21875 in
Column List Detail	White	18, 42, 73 #122A49	Tahoma 8 pt	Bottom #ADADAD	.21875 in
Column List Footer	White	49, 88, 140 #31588C		None	.21875 in
Column List Footer summary text	White	49, 88, 140 #31588C	Verdana 8 pt bold italic	None	.21875 in
Page Footer	White	102, 102, 102 #666666	Tahoma 8 pt bold	None	.28125

Matrix Reports

The following diagram shows a matrix report with two levels of grouping for both rows and columns. In addition, this report also has a report header, a page header, and a page footer.

Territory >	⊞ WEST	⊟ SOUTH							
Account >		kz1Jost	1K3sUwj	HRpOjTV	wAwiAiT	wRIijQT	tDubGeK	3QlwhLp	LtPWbfi
Year **Month**									
⊟ 2003 January	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
February	$25	$25	$25	$25	$25	$25	$25	$25	$25
March	$35	$35	$35	$35	$35	$35	$35	$35	$35
April	$60	$60	$60	$60	$60	$60	$60	$60	$60
May	$78	$78	$78	$78	$78	$78	$78	$78	$78
June	$75	$75	$75	$75	$75	$75	$75	$75	$75
July	$50	$50	$50	$50	$50	$50	$50	$50	$50
August	$250	$250	$250	$250	$250	$250	$250	$250	$250
September	$300	$300	$300	$300	$300	$300	$300	$300	$300
November	$25	$25	$25	$25	$25	$25	$25	$25	$25
December	$16	$16	$16	$16	$16	$16	$16	$16	$16
2003 Total	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*
⊞ 2004 *2004 Total*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*	*$2,548*
Total	**$35,984**	**$35,984**	**$35,984**	**$35,984**	**$35,984**	**$35,984**	**$35,984**	**$35,984**	**$35,984**

Matrix Report Formatting Information

The following table details the formatting for a matrix report.

Section Name	Background Color (RGB) (Hex)	Foreground Color	Font	Border	Height
Report/Page Header	222,221,207 #DEDDCF	Black	Tahoma 14 pt Bold	None	.5 in
Report Header summary text	222,221,207 #DEDDCF	102, 102, 102 #666666	Verdana 8 pt bold italic	None	Varies
Row Header Label	123,142,172 #7B8EAC	Black	Tahoma 8 pt bold	None	.25 in
Column Header Label – Top-level	4,9,15 #04090F	White	Tahoma 8 pt bold	None	.25 in
Column Header Label – 2nd-level	46,69,110 #2E456E	White	Tahoma 8 pt bold	None	.25 in
Top-level Row Header	158,158,158 #39E9E9E	White	Tahoma 8 pt bold	None	.25 in
2nd-level Row Header – Odd Row	174,174,174 #AEAEAE	White	Tahoma 8 pt bold	None	.25 in
2nd-level Row Header – Even Row	158,158,158 #9E9E9E	White	Tahoma 8 pt bold	None	.25 in
Top-level Column Header	4,9,15 #04090F	White	Tahoma 8 pt bold	None	.25 in
2nd-level	46,69,110	White	Tahoma 8 pt	None	.25 in

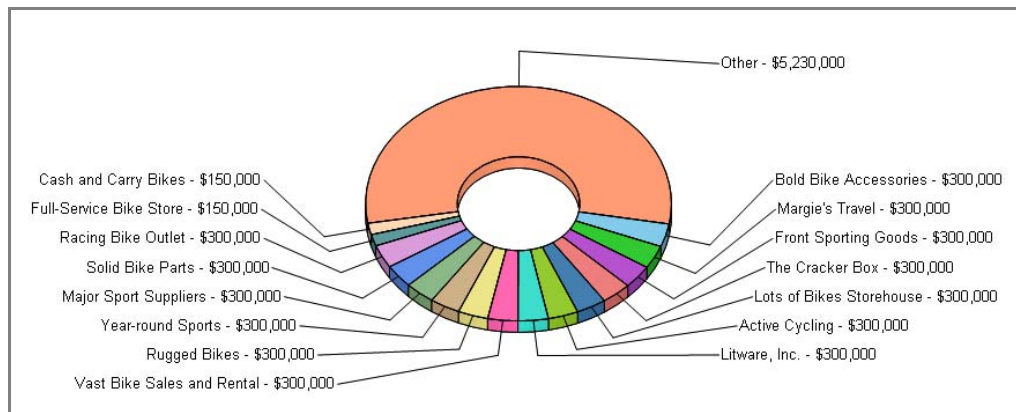|					
Column Header	#2E456E		bold		
Odd Row Cell	White	Black	Tahoma 8 pt	#C6C6C6	.25 in
Even Row Cell	250,250,250 #FAFAFA	Black	Tahoma 8 pt	None	.25 in
Row Group Summary Cell	158,158,158 #9E9E9E	Black	Verdana 8 pt italic	None	.25 in
Total Summary Cell	222,221,207 #DEDDCF	Black	Verdana 8 pt, Bold italic	None	.25 in
Cell Borders	198, 198, 198 #C6C6C6	None	None	1pt	None
Page Footer	222,221,207 #DEDDCF	102, 102, 102 #666666	Tahoma 8 pt bold	None	.28125

Chart Reports

The following chart reports are supported in Microsoft CRM:

- Donut Charts
- Thumbnail and Dashboard Pie Charts
- Column Charts

Donut Chart

Below is a pie chart in a ring shape that provides a perspective view. All requests for pie charts, except for thumbnails and dashboard charts, will use this type of chart.

Donut Report Formatting Information

The following table details the formatting for a donut chart report.

Chart Type	Color Palette	Chart Title	Chart Area Border	Data Point Borders	Data Point Labels
Donut, 3D, all	Pastel	Tahoma 10pt,	Gray 1pt	Gray .25 pt	(description)-

other defaults	Black, Bold		(formatted value)

Thumbnail Pie Charts

Use a small pie chart to represent a percentage value. Two data points are explicitly provided based on a scalar percentage value. The first data point is the value and the second data point is the reciprocal percentage value.
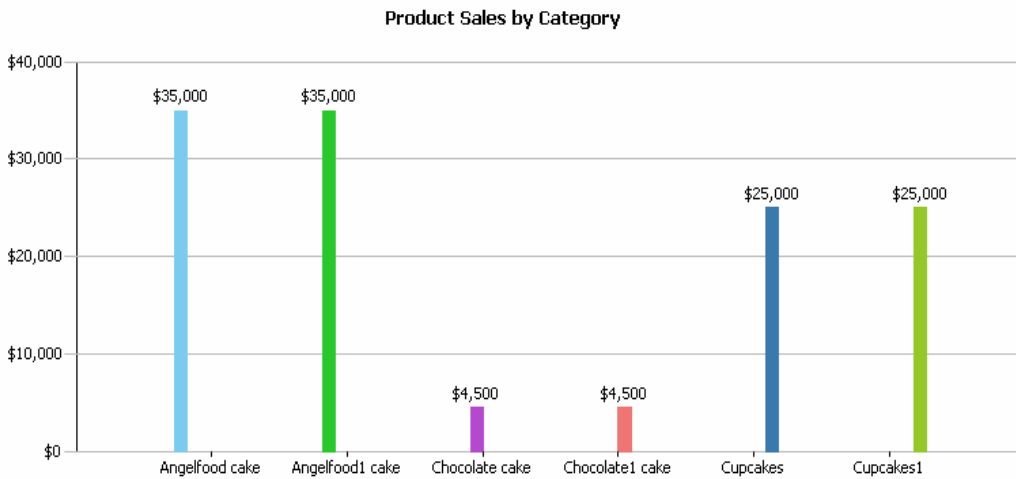
Thumbnail Pie Chart formatting information

The following table details the formatting for a thumbnail pie chart.

Chart type	Chart Data Point Borders	Percentage Value Fill Color	Remainder Value Fill Color
Pie, flat, all other defaults	Gray .25pt	100, 150, 192 #6496C0	225, 224, 196 #E1E0C4

Column Chart

Column chart reports display data points on vertical bars. Series labels are displayed on the X axis and major gridlines are displayed on the Y axis. Format the Y axis labels and data points in the appropriate format for the data type.

When data labels are too long, you can truncate them.

Column Chart formatting information

The following table details the formatting for a column chart.

Property	Value
Chart type	Column, flat
Title font	Tahoma 10 pt bold
Chart plot area background	White

Legend	None
Y Major gridline color	Silver 1 pt
X Major gridline color	Transparent
Series label font	Tahoma 8 pt black
Data point label font	Tahoma 8 pt black

Charts in Microsoft CRM reports will not have multiple series groups, which is a feature of the charting item component. In order to represent multi-value groups along an axis, multiple instances of the chart will be repeated within a grouped table.

Content Formatting

Time, date, number, and currency field values should be formatted using the **fn_GetFormatStrings()** SQL function that is provided in the Microsoft CRM database. This function returns a table with a single row as described in the following table.

Column Name	Description
DateFormat	Formats property for a date field.
TimeFormat	Formats property for a time field.
NumberLanguageCode	Formats property for a number language code field and identifies the language locale.
NumberFormat_0_Precision	Formats property for a number field that requires 0 decimal digits.
NumberFormat_1_Precision	Formats property for a number field that requires 1-decimal digits.
NumberFormat_2_Precision	Formats property for a number field that requires 2-decimal digits.
NumberFormat_3_Precision	Formats property for a number field that requires 3-decimal digits.
NumberFormat_4_Precision	Formats property for a number field that requires 4-decimal digits.
NumberFormat_5_Precision	Formats property for a number field that requires 5-decimal digits.
CurrencyFormat_0_Precision	Formats property for a currency field that requires 0-decimal digits.
CurrencyFormat_1_Precision	Formats property for a currency field that requires 1-decimal digits.
CurrencyFormat_2_Precision	Formats property for a currency field that requires 2-decimal digits.
CurrencyFormat_3_Precision	Formats property for a currency field that requires 3-decimal digits.
CurrencyFormat_4_Precision	Formats property for a currency field that requires 4-decimal digits.
CurrencyFormat_5_Precision	Formats property for a currency field that requires 5-decimal digits.