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Charting with DocumentsCorePack for Microsoft Dynamics 365 and PowerApps

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Charts vs Tables

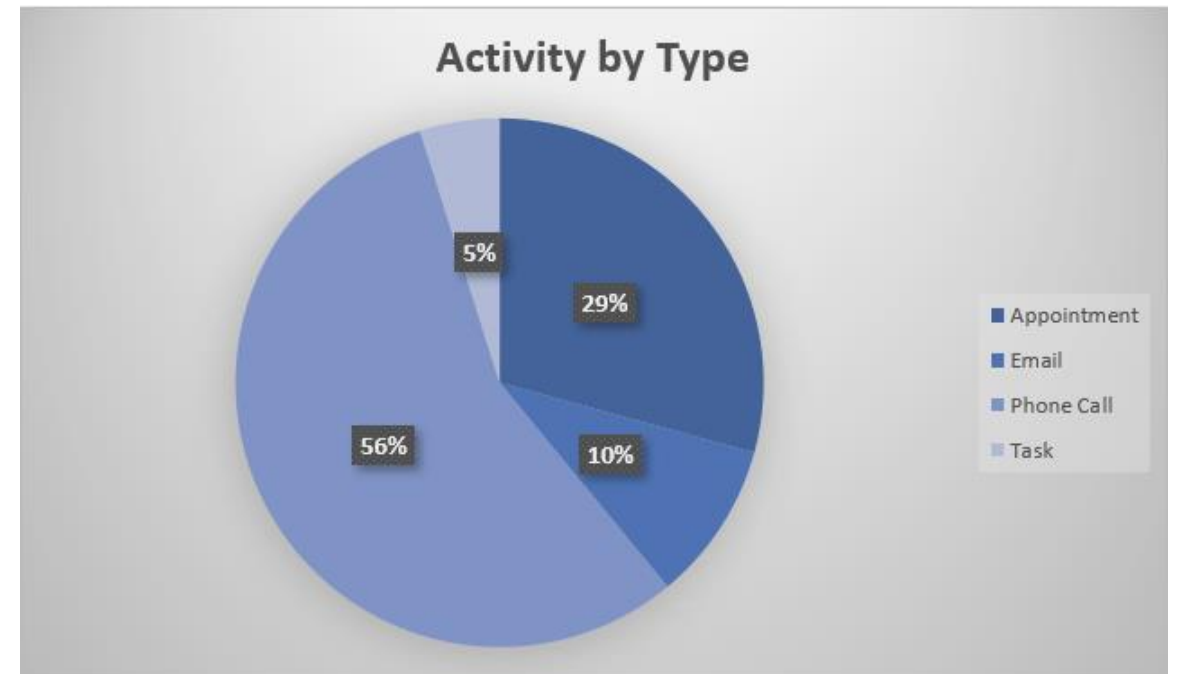
Tables:

- Good for seeing individual values

Charts:

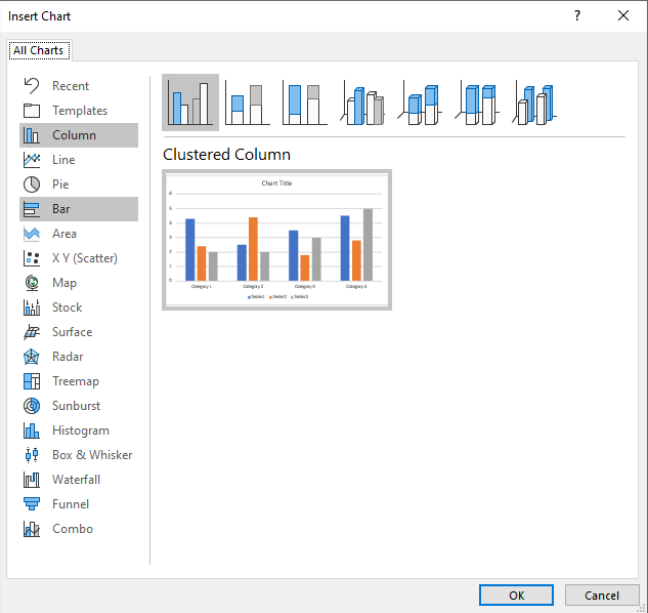
- Provide a quick overview immediately.
- See patterns and trends.
- Display relationships among whole value sets.

Activity Type	Number of Activities
Appointment	6
Email	4
Phone Call	23



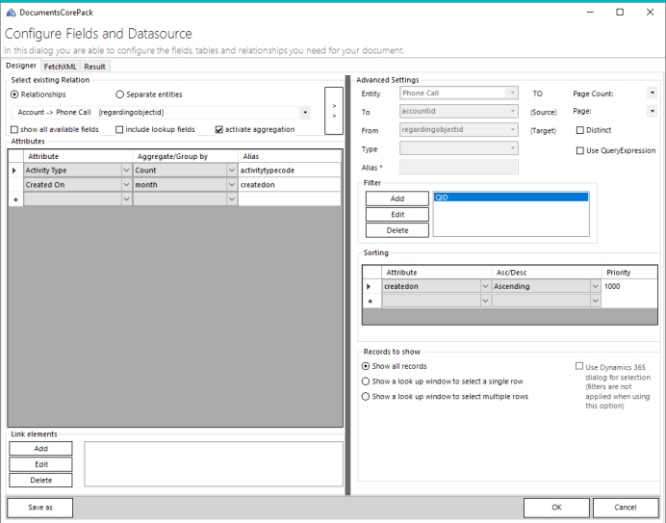
Creating Charts in three steps:

1. Insert Chart



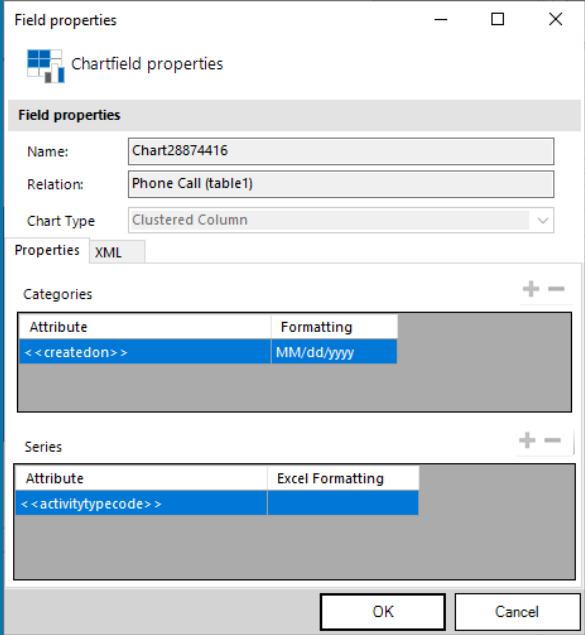
- I. Insert Microsoft Word Chart
- II. Most chart types supported*

2. Prepare Data



- Create DataSet:
- I. Grouping/Category
 - II. Aggregation
 - III. Filtering,
 - IV. Sorting

3. Connect Chart to Data



- I. Map the data via chart field properties

Demo

1. Step-by-Step: Creating a Simple Pie Chart
2. Step-by-Step: Creating a more focused Bar Chart
3. Step-by-Step: Using Global Charts

Support Chart Types

Dynamics 365 Chart Type		MS Word Chart Types	
Bar	✓	Bar, 3DBar	✓
Column	✓	Column, 3DColumn	✓
Line	✓	Line, 3DLine, Area, 3D Area	✓
Pie	✓	Pie, Pie of Pie, 3DPie, Bar of Pie	✓
Funnel	✗	Funell, Waterfall	✗
Point	✓	Bubble, Surface	✓
StackedColumn, StackedColumn100	✓	Stock Chart, Treemap, Sunburst, Histogram	✗
StackedBar, StackedBar100	✓	Radar	✓
Tag	✗	Combined Charts	
DoughNut	✓	Doughnut	✓

Thank You + stay healthy!

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