William McGraw & Kameron DeDecker

[Excalibur login information 2](#_Toc193203877)

[Topic 1: Analysis mode on list pages 2](#_Toc193203878)

[Steps 2](#_Toc193203879)

[Topic 2: Exporting Data to Excel using OData 3](#_Toc193203880)

[Steps 3](#_Toc193203881)

[Topic 3: Excel report layouts 4](#_Toc193203882)

[Steps 4](#_Toc193203883)

[Testing your layout 5](#_Toc193203884)

# Excalibur login information

URL: <https://userconference.camelot3plcloud.com/EXCALIBUR/?company=W03>

Username: EXCEL2025

Password: ExcelUC2025!

Past conference materials on the client portal

# Topic 1: Analysis mode on list pages

This lesson will demonstrate creating ad-hoc analyses and reports on lists. These reports can be quickly shared with coworkers. In this scenario, we are going to create a report that shows the sum of invoice revenue in each month. Analysis mode in Business Central is available starting in Excalibur version 23.0.

## Steps

1. In Excalibur, navigate to **Posted Invoices**
2. On the action bar, choose **Analysis Mode** 
3. Create a new tab and rename it to *[Your Assigned Code]* + **Client activity over time**.
4. Go to the **Columns** menu and remove all columns (select the box next to the **Search** field on the right twice).
5. Turn on the **Pivot Mode** toggle (located above the **Search** field on the right).
6. Drag **Invoice Date Year**, **Invoice Date Month**, and **Client** to the **Row Groups** area.



Analysis tabs are only created for your user, but they can be shared with coworkers.

1. Select the analysis tab name and choose **Copy link** from the menu.
2. On the dialog, change the link type as needed and choose **Copy**.
3. Send the link to a coworker.

# Topic 2: Exporting Data to Excel using OData

This lesson will demonstrate a method of automatically importing data from Excalibur into Excel requiring minimal setup. Then by using basic Excel PivotTables, build a simple dashboard to get quick insights out of pending transaction data. In this scenario, we are going to create a report that shows the number of pending transactions assigned to operators.

## Steps

1. In Excalibur, navigate to **Web Services** and search for **UCExcelTrx**
2. Select the hyperlinked value in ***OData V4 URL*** to open a new browser tab.
3. Copy the URL in the address bar and close the browser tab.
4. In a new Excel workbook, rename Sheet1 to “Dashboard.”
5. From the Data tab, select **Get Data** > **From Other Sources** > **From OData Feed**.
6. Select **Ctrl+V** to paste the URL and choose **OK**.
7. Authenticate using the basic authentication type with the credentials on page 1, then choose **Load** to create the query connection.
8. Rename Query1 to “Transaction List.”
9. From the Table Design menu enter “Transaction” into **Table Name**.
10. Select **Insert>PivotTable>From Table/Range** and make sure that the Transactions table is specified in the **Table/Range**.
11. Select **Existing Worksheet** and select cell O1 of the Dashboard sheet, then select **OK**.
12. From the PivotTable Analyze tab enter **Trx by Operator** into **PivotTable Name**.
13. Build the PivotTable as follows
	1. Filters
		1. Doc\_Date
		2. Document\_Type
	2. Rows
		1. Assigned\_User
	3. Values
		1. Document

This workbook can be refreshed using web service.

1. Manual refresh
	1. From the Data tab select **Refresh All** (**Ctrl+Alt+F5**)
2. Scheduled refresh
	1. From the Query tab select **Properties**
	2. From the Query Properties dialog toggle the ***Refresh every X minutes*** field and set the interval to 30 minutes

# Topic 3: Excel report layouts

This lesson will demonstrate a method of creating an Excel layout for a report. This activity includes a section for independent work where the attendee will be asked to modify their Excel layout as they see fit. In this scenario, we are going to create a report that shows the sum of revenue per client per service.

## Steps

1. In Excalibur, navigate to **Report Layouts**.
2. Search for **37005339** and choose **Run Report**.
3. On the request page, choose **Send to**, then **Microsoft Excel Document (data only)**, and then **OK**.
4. Open the downloaded file in Excel.
5. Create a new worksheet and rename it to **Revenue**
6. On the ribbon, choose **Insert** > **PivotTable** > **From Table/Range** and specify the **Data** table in **Table/Range**.
7. Choose **Existing Worksheet** to place the PivotTable in an existing worksheet.
8. Select cell B8 of the Revenue worksheet to place to PivotTable in cell A1, then choose **OK** to create the PivotTable.
9. Select the PivotTable, then enter **Client Revenue by Service** into **PivotTable Name** located in the PivotTable Analyze menu.
10. Build the PivotTable as follows:
	1. Columns
		1. PWBillingDetail\_Client
	2. Rows
		1. PWBillingDetail\_ServiceCode
	3. Values
		1. PWBillingDetail\_ChargeAmount (sum)
11. In cell B2 type in a custom title (e.g. **Client** **Revenue per** **Service Code**).
12. Save and close the workbook.
13. In Excalibur, choose **New Layout** on the **Report Layouts** page.
14. In ***Report ID***, enter **37005339**.
15. In **Layout Name**, enter **Billing Edit List\_** + *[Your Assigned Code]*.
	1. Example: **Billing Edit List\_Excel1**
16. In the **Format Options** field, choose **Excel**.
17. Choose **OK**, then drag and drop your Excel file into the dialog box.

## Testing your layout

1. On the **Report Layouts** page, search for **Billing Edit List\_** + *[Your Assigned Code]*.
	1. Example: **Billing Edit List\_Excel1**
2. Choose **Run Report**.
3. On the request page, choose **Download**.
4. Open the downloaded file in Excel and confirm that your layout is visible.