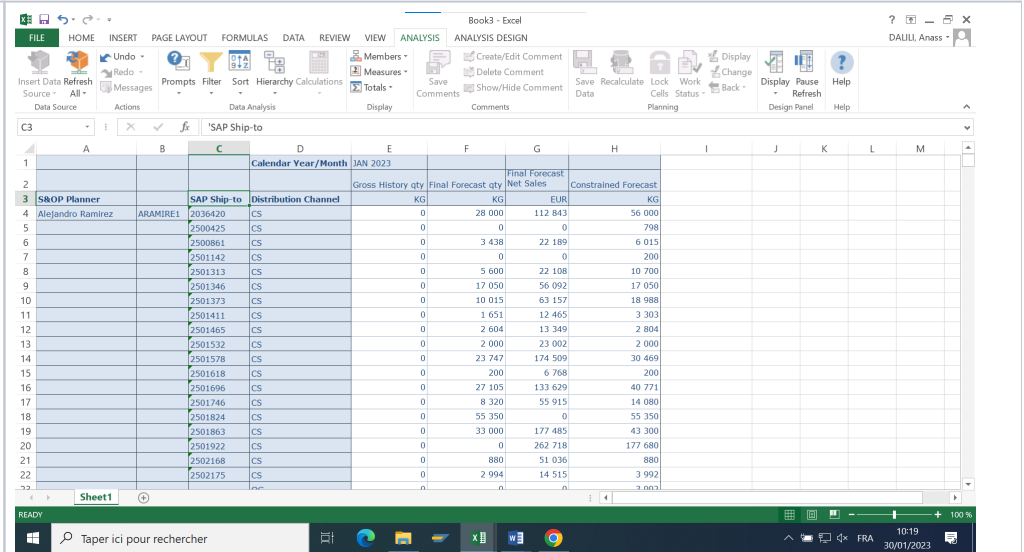


Change the Query Source In an Existing Workbook

User case :

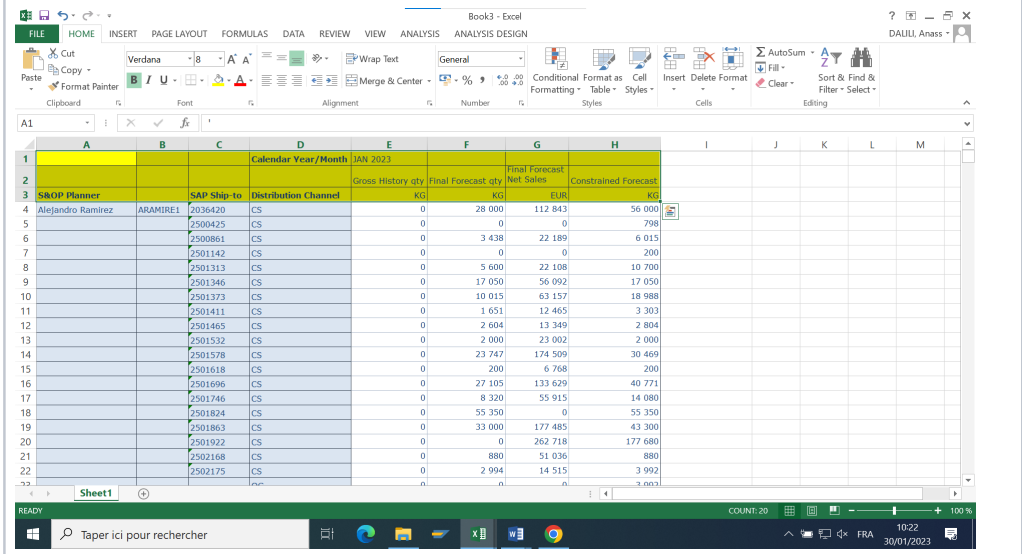
You have build a workbook on an obsolete core query and you want to move your workbook on a new core query without recreating it from scratch

1-Open the workbook you want to adapt



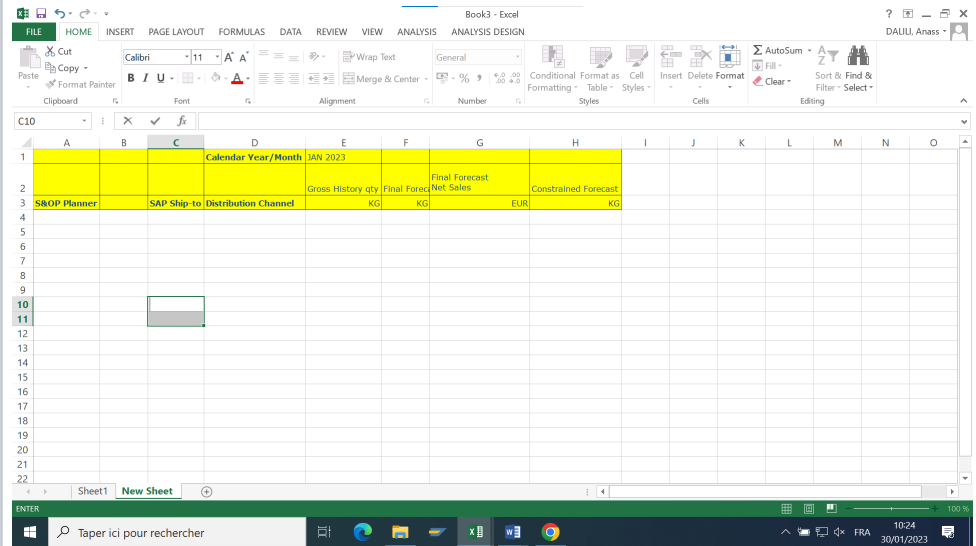
2-Create (if not existing) a fix header

Add lines on the top and copy/paste your header lines



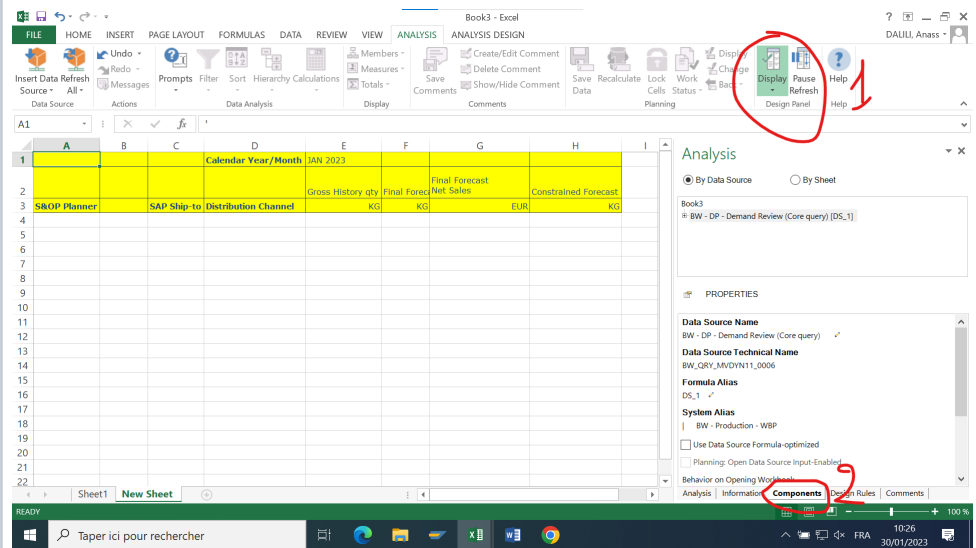
3-Prepare the new query to fit the existing format

Copy-paste the header in a new tab



Display the 'Design Panel' (1)

Open the 'Component' tab (2)



4-Add a new data source

The screenshot shows the 'Analysis' application window. At the top, there are radio buttons for 'By Data Source' (selected) and 'By Sheet'. Below this, a context menu is open over a file named 'Change Query Source.xlsx'. The menu items are: 'Use Data Source...', 'Use Planning Function...', 'Use Planning Sequence...', 'Refresh All', 'Log Off', and 'Replace System...'. Below the menu, the 'Refresh Behavior' settings are visible, including checkboxes for 'Refresh Workbook on Opening' and 'Force Prompt for Initial Refresh', and a dropdown for 'Subsequent Refresh' set to 'Log Off and Reconnect'. At the bottom, there are tabs for 'Analysis', 'Information', 'Components', 'Design Rules', and 'Comments'.

5-Select the new core query

For example BW-DP-Budget Review (Core query)

The screenshot shows a file explorer window with a folder named 'DP - Demand Planning'. Inside this folder, there are four sub-items, each with a document icon and a blue highlight: 'BW - DP - Budget Review (Core query)', 'BW - DP - Demand Review (Core query)', and 'BW - DP - Forecast Accuracy (Core query)'. The first item is highlighted with a blue selection box.

6-Check/update the selection

The screenshot shows a dialog box titled 'Prompts for BW - DP - Budget Review (Core query)'. It has a 'Use Variant' dropdown set to 'Select a variant or enter a name and choose save to create a new user variant'. Below this, there are two main sections: 'Prompt Summary' and 'Specify Value for Prompts'. The 'Prompt Summary' section has a search bar and a list of variables, with '* UoM for Qty conversion (Single value, Mandatory)' selected. The 'Specify Value for Prompts' section has a table of variables and their values:

Variable	Value
* Calendar Month/Year (Interval, Mandatory)	01.2023
BFC GBU (Selection Option, Optional)	CS
BFC Group of activities (Selection Option, Optional)	
* Currency	EUR
* UoM for Qty conversion (Single value, Mandatory)	KG
Material (Select option, Optional)	
Commercial Product (Select option, Optional)	
Product Hierarchy (Selection option, optional)	

At the bottom, there are 'Display', 'Clear All', 'OK', and 'Cancel' buttons.

7-Insert a Crosstab to see the query result

Analysis

By Data Source By Sheet

Change Query Source.xlsx

✦ BW - DP - Demand Review (Core query) [DS_1]

✦ BW - DP - Budget Review (Core query) [DS_2]

Copy

Insert Crosstab

Delete

Reset Data Source

PROPERTY

8-Insert the query in the new tab below the header

The screenshot shows the Microsoft Excel interface with the 'Analysis' ribbon selected. The 'ANALYSIS DESIGN' group contains the 'Insert Crosstab' button, which is highlighted. A dialog box titled 'Insert Crosstab' is open, showing 'Cell' as 'New Sheet!\$A\$4'. The 'Analysis' task pane on the right is also visible, showing the 'By Data Source' radio button selected and a list of data sources: 'BW - DP - Demand Review (Core query) [DS_1]' and 'BW - DP - Budget Review (Core query) [DS_2]'. The 'PROPERTIES' section of the task pane shows details for the selected data source, including 'Data Source Name', 'Data Source Technical Name', and 'Formula Alias'. The background shows a spreadsheet with columns for 'Calendar Year/Month', 'SAP Ship-to', 'Distribution Channel', 'Gross History Qty', 'Final Forecast', 'Final Forecast Net Sales', and 'Constrained Forecast'.

9-Adjust the new query to have the same data

Analysis

View for: BW - DP - Budget Review (Core query)

Find:

DATA SOURCE

- [-] BW - DP - Budget Review (Core query)
 - [-] Measures
 - [-] ABC Class (auto)
 - [-] ABC Class (manual)
 - [-] ABC Variability
 - [-] Account Manager (M3)
 - [-] Active DFU (Y/N)
 - [-] Base Material PRODCO
 - [-] BFC Activity 1
 - [-] BFC Global Business Unit
 - [-] BFC Group of activities
 - [-] BU
 - [-] C/O (Ship-to)
 - [-] C/O (Sold-to)
 - [-] Cal. Year/Quarter
 - [-] Calendar month
 - [-] Calendar Year
 - [-] Calendar Year/Month
 - [-] Catalog LT

COLUMNS

- [-] Measures (Key Figures)

ROWS

- [-] Source System
- [-] Material
- [-] SAP Ship-to

BACKGROUND FILTER

S&OP Planner	SAP Ship-to	Distribution Channel	JAN 2023	JAN 2023 - Final Forecast Qty
ARAMIRE1	Alejandro Ramirez	CS	341899	SUR QUIMICA SA
			343362	WESTRADE GUATEMALA SA
			359038	SALONES DE BELLEZA Y EQUIPOS
			2036420	MISSION HILLS SA DE CV
			2500425	MAHLE BEHR, MEXICO, S. RL DE CV.
			2500861	KATHION CHEMIE DE MEXICO S. DE RL DE
			2501075	VALEO SISTEMAS ELECTRICOS.
			2501142	PPG INDUSTRIAS DE MEXICO SA DE CV
			2501161	MACDERMID DE MEXICO SA DE CV
			2501313	RECKITT BENCKISER MEXICO SA DE CV
			2501346	ZVS QUIMICOS S.A. DE C.V.
			2501373	CIA SHERWIN WILLIAMS SA DE CV
			2501400	ESTILO Y VANIDAD SA DE CV
			2501406	FMC AGROQUIMICA DE MEXICO,
			2501411	DALEGIP MEXICO S DE RL DE CV
			2501422	INDUSTRIAS GREHER, S.A. DE C.V.
			2501423	INTERNATIONAL FLAVORS & FRAGRANCES
			2501465	STANIL DE MEXICO SA DE CV
			2501497	HUNTSMAN INTERNATIONAL DE MEXICO

10-Delete the cross tab from the old query

For example delete the cross tab from the Demand Review

Analysis

By Data Source By Sheet

Change Query Source.xlsx

- [-] BW - DP - Budget Review (Core query) [DS_2]
- [-] Crosstab 2
- [-] BW - DP - Demand Review (Core query) [DS_11]

Copy

Delete

Reset Data Source