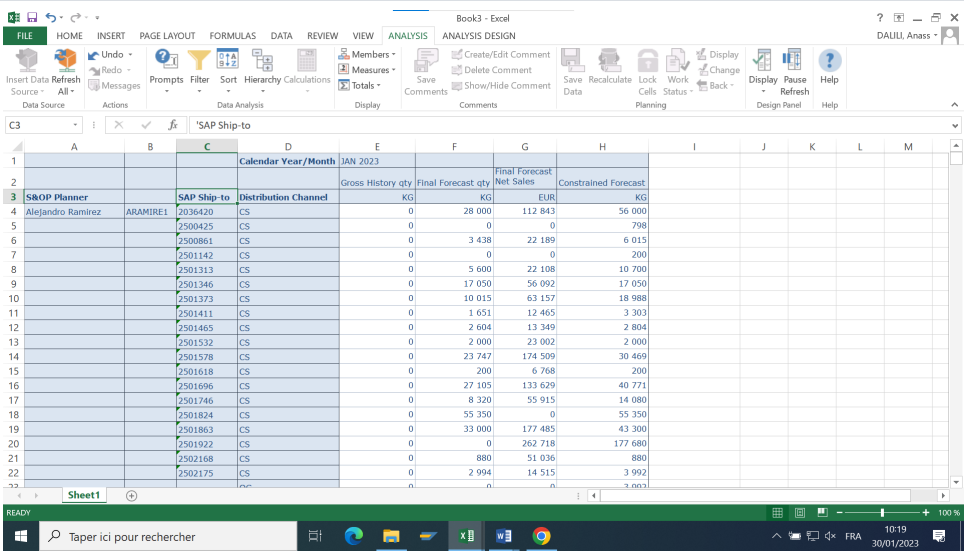


Change the Query Source In an Existing Workbook

User case :

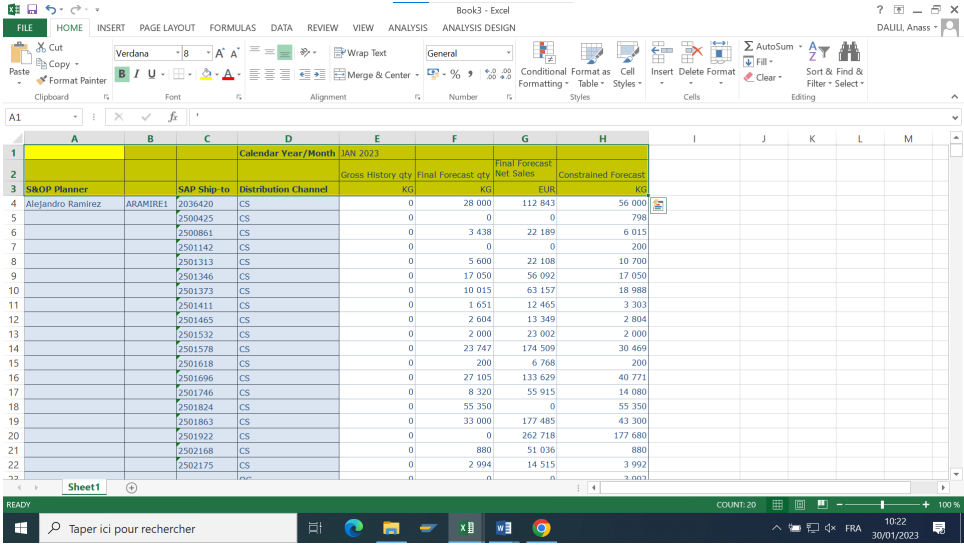
You have build a workbook on an obsolete core query and you want to move your workbook on a new core query without recreating it from scratch

1-Open the workbook you want to adapt



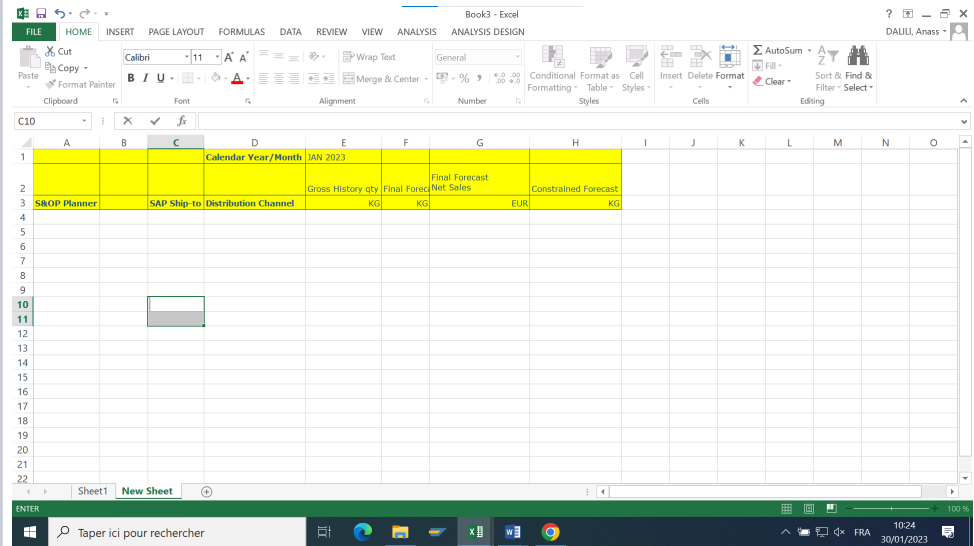
2-Create (if not existing) a fix header

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



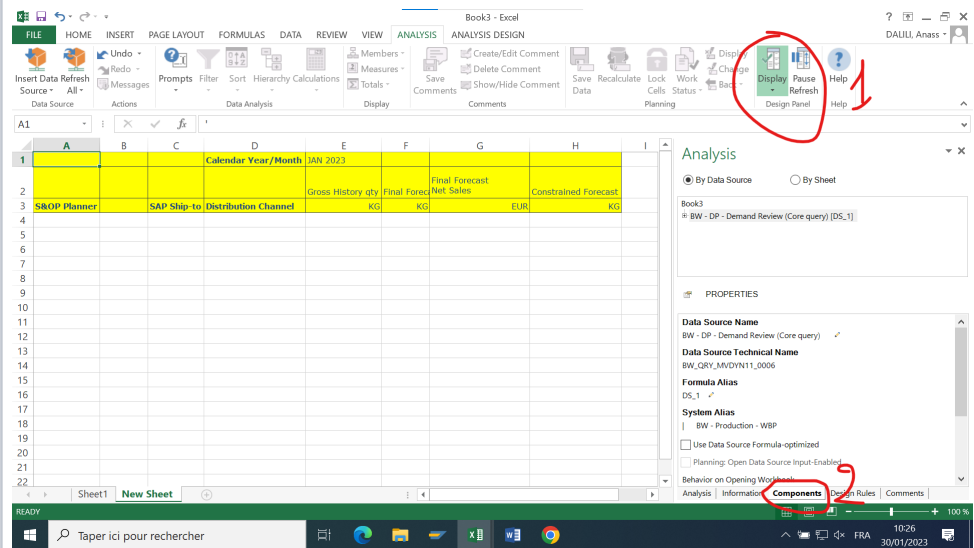
3-Prepare the new query to fit the existing format

Copy-paste the header in a new tab



Display the 'Design Panel' (1)

Open the 'Component' tab (2)



4-Add a new data source

Analysis

By Data Source

By Sheet

Change Query Source.xlsx

Use Data Source...

Use Planning Function...

Use Planning Sequence...

Refresh All

Log Off

Replace System...

PROPERTY

General

Planning

Name

Change Query Source.xlsx

Refresh Behavior

Refresh Workbook on Opening

Force Prompt for Initial Refresh

Subsequent Refresh

Log Off and Reconnect

General

Start Prompts with Workbook

Analysis

Information

Components

Design Rules

Comments

5-Select the new core query

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

DP - Demand Planning

BW - DP - Budget Review (Core query)

BW - DP - Demand Review (Core query)

BW - DP - Forecast Accuracy (Core query)

6-Check/update the selection

Prompts for BW - DP - Budget Review (Core query)

Use Variant

Select a variant or enter a name and choose save to create a new user variant

Prompt Summary

Search variables...

* Calendar Month/Year (Interval, Mandatory): *

BFC GBU (Selection Option, Optional): NOVE*

BFC Group of activities (Selection Option, Op *

* Currency: Euro

* UoM for Qty conversion (Single value, Mani *

Material (Select option, Optional):

Commercial Product (Select option, Optional, *

Product Hierarchy (Selection option, optional *

Ship-to (Selection Option, Optional):

Distribution Channel (Selection option, Optio *

GBR Customer Group (Select Option, Options *

Specify Value for Prompts

* Calendar Month/Year (Interval, Mandatory)

01.2023

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)

=

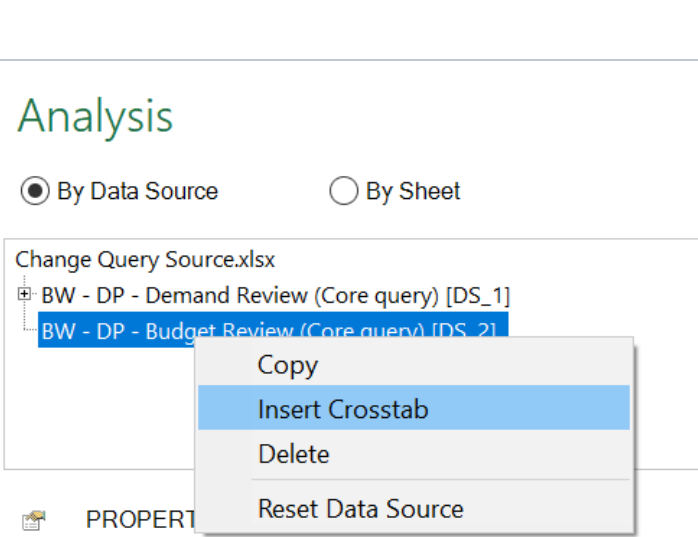
Display

Clear All

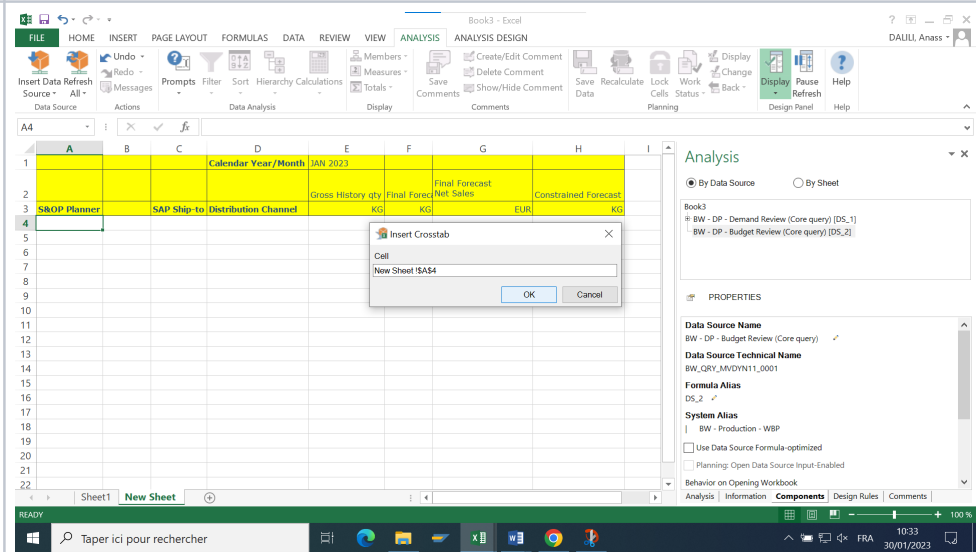
OK

Cancel

7-Insert a Crosstab to see the query result



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



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

Measures: Filter By Member

Find Members: Text

Display: Hierarchy

Member (Text)

- ☐ Final Sales Team Forecast (ETD)
- ☐ Final Sales Team Forecast Net Sales
- ☐ Sales Team Forecast M-1
- ☐ Sales Team Forecast M-2
- ☒ Final Forecast
- ☐ Final Forecast (ETD)
- ☐ Final Forecast M-1
- ☐ Final Forecast M-2
- ☐ Final Sales Price LCKG
- ☐ Final Sales Price CURR/UNIT
- ☐ Final Sales Price CURR/KG
- ☐ Final Forecast Net Sales
- ☐ Final Forecast Net Sales (C)

OK Cancel

Analysis | Information | Components | Design Rules | Comments

S&OP Planner	SAP Ship-to	Distribution Channel	JAN 2023	JAN 2023 - Final Forecast Qty
ARAMEI1	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 REHR 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	STAHL 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_1]

Copy

Delete

Reset Data Source

PROPE