Advanced Functions for Queries and Workbooks

Multiple Selection and Importing of Variable Values to a Selection Screen for a Query

When selecting variables to refresh or update some queries, you may need to select multiple values or import values into the selection fields.

1. If a field allows for multiple selections, for example Cost Object (Fund Code), use the **Select from List (drop-down)** button to the right of the field as you would for any field to select a value.

2. In the resulting Select Values for..., click on the **More >>** button (displays only if the field allows for multiple selections).
3. To choose multiple values for the selection:

- Click on a value to select and highlight that value under either the list of values on the left.
- Click on the \textbf{Move to Selection} button and verify the selected item now displays on the right under Chosen Selections (example, Cost Object / Fund Code).
- If needed, use the \textbf{Remove from Selection} button to remove any values that display under Chosen Selections.
- Click \textbf{OK} when all values are selected.
4. To import values from a spreadsheet, etc., right click in the white area under Chosen Selections and use one of these options:

- Click on **Upload Selections** option and upload from a spreadsheet.
- OR if values were copied into the clipboard, click on **Paste** (which will be highlighted and available if there is data in the clipboard).

5. Click **OK** to exit the window and complete the selection of multiple values.
Refresh a Workbook Containing Multiple Embedded Queries

1. Review the points below regarding the settings needed and other nuances of refreshing workbooks with multiple embedded queries:

   • As a reminder, a query within a workbook must be refreshed in order to access the Context Menu options (Swap with, Drill-down, etc.) via the right mouse click function. This applies to workbooks with multiple embedded queries as well.

   • As a reminder, if you right mouse click in a native Excel cell (outside of the embedded query results), the Context Menu will display only the Excel functions versus the Business Analyzer functions, so be sure to right click within the results.

   • If a workbook is opened and embedded queries have NOT been refreshed, the right mouse click will only display the Refresh options which will vary based on your Global and Workbook settings.

   • To ensure you have the flexibility to refresh each individual query embedded in a workbook, you must set preferences in via the Global Settings button and then Workbook settings (in that order). For new workbooks, this option is DISABLED by default, so you must enable this setting for new workbooks containing multiple queries, if desired.
2. **BEFORE USING GLOBAL SETTINGS** in the next step, ensure the “plug is connected” in the icon for the Connect button per above examples, as follows:

- If the icon shows the plug is NOT connected, simply click on the button.

- At the SAP Logon prompt, click on BWP (BW Production) and click **OK**.

- In the SAP Logon a BWP prompt, enter Logon credentials if not already defaulting and click **OK**.

- Ensure the “plug” is connected in the icon (see connected example in diagram at top of page).
3. After the Connect button shows as connected, click the **Global Settings** button on the *lower level of the BEx toolbar* (Do **NOT** use the similar looking Workbook Settings button on the BEx toolbar top row).

   **Note:** The buttons for Global Settings (bottom toolbar) and Workbook Settings (top toolbar) have the same icon. **If you click the incorrect Workbook Settings button for this step, then performance problems may be encountered since the Workbook Settings button requires a refresh of ALL queries in the workbook.**

4. In the Global Settings box, click in the check box to enable the **Allow Refresh on Individual Queries for all Running Workbooks** option.

5. Click the **OK** button.
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6. Select the worksheet you would like to refresh (bottom tabs in Excel – not shown above) and click into a BEx active cell (shaded cell in body of query/workbook results).

7. Click the **Refresh** button on the toolbar or use the context menu (right click) and select option **Refresh This Query** to process the active query.
   - If prompted, specify / update values in the *Select Values for Variables* window (not shown in this example).

8. After the query has refreshed, click the **Workbook Settings** button (this button places you in the Design Mode).
9. In the Workbook Settings box, under the **General** tab, verify the option **Allow Refresh Function for Individual Queries** is enabled (click to check if not enabled; note that for new BEx 7.0 workbooks, this setting is disabled by default).
10. Click on the **Variables** tab and use the guideline below:

- **Display Common Variables Only Once** – if this is enabled (checked) then all variable selections for ALL embedded queries are displayed on one screen.

- **Disable** the option if you want to display and select variable values independently in the Change Variables Values box for each individual query.

11. Click **OK** to close the window – the workbook will automatically be placed in **Design Mode** (screen looks different and no results are displayed).

12. Click the **BEx Design Toolbox: Exit Design Mode** button to exit Design Mode.

13. Click on the **Save** button to save the Workbook.
14. Based on the preferences set for the workbook in the previous steps, review the various **Refresh options** below that may be available based on the preferences set for the workbook with multiple embedded queries – **the options available also vary by whether you use the right click (Context Menu) and Refresh button:**

- **Refresh** – *Be careful when selecting this option.* FOR WORKBOOKS WITH MULTIPLE EMBEDDED QUERIES this option **ALWAYS refreshes all embedded active queries** within the workbook at once, whether used via the toolbar button or Context Menu (right mouse click). This option continues to appear until all active queries have been refreshed.

- **Refresh This Query** – when available based on your settings, refreshes just the embedded query in a worksheet selected within a workbook.

- **Full Refresh of Active Queries** – works like Refresh to refresh all active embedded queries within the workbook at once.

15. To refresh only the query displayed in a workbook with multiple queries, click into an active cell within that worksheet (use bottom tabs to select worksheet).
16. Once clicked into an active cell, choose one of these options to refresh the query embedded in the selected worksheet:

- Use the **Refresh** button on the toolbar OR right click in any active cell to view the list of Refresh options
- OR use the **Change Variable Values** button (see note below and refer to the Change the Variable Values section of this guide located under Opening a Workbook…).

**Note:** When using the Refresh option, you may or may not be prompted to enter selection variables depending on your workbook settings. Using the **Change Variable Values** button will refresh and prompt you to update the selection values and is recommended.

17. If you chose to use the Refresh options, click ‘**Refresh This Query**’ to refresh the active query displayed.

- **WARNING:** If you use the **Refresh** button to refresh an embedded query, be sure to have clicked into an active BEx cell within the results to ensure that all Refresh options are available.

18. Review the following points that pertain to the active selected query AFTER that query is refreshed (no example shown):

- Clicking on the **Refresh** toolbar button with a cell selected within the refreshed query results now only displays the option ‘**Full Refresh of Active Queries**’.
- The option ‘**Refresh This Query**’ is no longer available for that selected query.
- Right clicking on an active cell will display the Context Menu options.
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19. Review the following about selecting another worksheet with an embedded query that HAS NOT been refreshed (no example shown):

- Selecting another sheet or query which has not been refreshed in the workbook will only include ‘Refresh This Query’ via the context menu option (right click).

- The Refresh toolbar button will display both ‘Full Refresh of Active Queries’ and ‘Refresh This Query’.

Note: Even after you have refreshed an individual query in the workbook with multiple embedded queries, the Refresh option will display at the top of the Context Menu (right mouse click) along with other options like Filter, Swap with…, etc. for that individual query / worksheet. This may be confusing as it appears you need to Refresh again, but if that option is chosen, all embedded queries will be refreshed, not just the individual query within the workbook.
Copy a Query to a Worksheet using the Copy Sheet Function (Replaces Copy Query in Older Versions)

Note: The Copy Sheet function allows you to copy an embedded query from one Excel worksheet (tab at bottom) into another worksheet and refresh the variable values. This function replaces the old Copy Query option (Context Menu) in prior BEx versions.

1. To copy a query from one Excel worksheet into another worksheet (bottom tabs), select the tab containing the query.

2. On the selected worksheet with the query, click on the Tools button (lower toolbar).

3. Click on Copy Sheet function to copy a query to another worksheet in Excel (bottom tabs) as needed.
4. In the Select Values for Variables window if prompted, update any variable value selections as needed.

5. Click **OK**.

   Note: If you do not change any variables as you copy the query to a new worksheet, you may get a blank results screen that prompts you to change variable values for the selection. Use the **Change Variable Values** button to update / refresh the results (see the Change Variable Values topic in the Opening Workbooks… section of this guide for more on that function.

6. When you save the workbook as an Excel file versus on the BW server using the BEx toolbar, you may encounter the above warning message when using Copy Sheet - click on the **Save changes and discard signature** button to save the workbook.