Opening a Workbook in BW to Access the Saved Query at a Later Date

Note: To avoid any issues with SAP BW, ensure that all other open Excel files are closed.

1. Log into BW and use the transaction code RRMX to launch Excel and click on the Add-Ins option to display the BEx Analyzer toolbar (not shown – see Logging Into SAP BW chapter of this guide).

2. Click on the Open button on the BEx Analyzer toolbar.

3. Click on Open Workbook... from the drop-down list.
On the resulting *Open Workbook* window:

4. Click on the **Favorites** button (left side of the screen).
   
   **Note:** As an alternative, you may also open the **History** or the **Roles** folder, or use the Find button to locate the workbook using similar steps as outlined earlier in this guide for finding queries. The Roles folder contains workbooks of saved queries used primarily by central finance areas within Duke. The Roles folder contains a folder for the School of Medicine for Tiered reports.

5. **Double click on a workbook** (i.e., the named workbook, like Financial Services FTB file in this example) **OR** click once to select and highlight the workbook and click on the **Open** button.
Opening a Workbook (cont.)

6. **IMPORTANT:** Once the workbook is open, the formatted query or queries embedded in the workbook must be refreshed before any other functions like those on the Context Menu / right mouse click may be performed (functions won’t be available) – the refresh can be done as follows:

- If the workbook contains a single query and needs to be refreshed to the last selected criteria, use the steps for Refresh a Workbook Containing One Single Query.

  *Note:* If the workbook contains multiple queries, use the steps in the Advanced Functions chapter of this guide for Refresh a Workbook Containing Multiple Queries (this option includes steps for refreshing one query at a time as well as refreshing all queries at once).

- Recommended: Always use the **Change Variable Values** button to refresh a query, as well as to change the selection criteria for a query. Refer to the steps for Change the Variable Values in the next pages. The other option of using the Refresh button or menu may not always prompt you to update your selection criteria (i.e., change the variable values for the query). If you are not prompted to update the variables for the selection criteria when you use the Refresh options, then you will have to use the Change Variable Values button to refresh the query and be prompted to change the variable values.
Opening a Workbook (cont.)

Change the Variable Values

**Note:** Use this method to update the selection criteria for the embedded query and refresh the workbook, for example to change the period selected to a current closed period.

1. Click on the **Change Variable Values** button on the toolbar.

2. In the **Select Values for Variables** window, select from the list of Available Variants in the dropdown list or update the selection fields as needed.

3. When ready to run the query, click the **OK** button.

- **DO NOT CANCEL** the window for Change Variable Values once displayed if the action is not needed – use the **OK** button. You must click **OK** to re-process the query and display the results even if you don’t change variables.

- **Cancelling the window deletes all the results displayed**, so if you do cancel out of the window, then don’t save the workbook results.

- Note that the context (right mouse click) menu is NOT available if the Change Variable Values was cancelled and the workbook was refreshed.
Opening a Workbook (cont.)

Refresh a Workbook Containing One Single Embedded Query

*Note:* There are two ways to access the Refresh function – the Context Menu or the Refresh button. See steps below for each.

1. To refresh the query using the Context Menu, **right mouse click into an active BEx cell** (any cell within the query results) to display a list of options - click on the **Refresh** option.

2. To refresh the query using the toolbar, **click once into an active BEx cell** and click the **Refresh** button on the toolbar to display a list of options - click on the **Refresh** option.