

CLASS AGENDA

Level 2: Reporting

Course Description

This three-day, hands-on course covers advanced Member Filters, Dynamic Calculations and format settings for Cube Views, BI Viewer and advanced Components, Dashboard layouts and embedded Dashboards, and the OneStream features used in Report Books.

Note that this course does not cover reports built in OneStream Studio—Please review Navigator content.

Who Should Attend

Only expert administrators who have experience creating OneStream Cube Views and Dashboards or advanced implementation services professionals should attend. The program level of this course is intermediate.

Prerequisites and Advanced Preparation

Prior to taking this course, you should complete one of the following courses, or possess equivalent knowledge:

- ✓ Application Build for Administrators
- ✓ First Project Readiness Learning Path
- ✓ Application Build for Consultants

In addition to the course prerequisites above, all attendees must proficient with concepts such as: navigating OneStream, Cube Views and Cube View formatting, Cube View Designer, Dimensionality, basic Member Filters and Expansions, Dashboards and Dashboard Maintenance Units, and basic Data Adapters and Components. This is an intermediate class which does not review content from other classes, such as Application Build for Administrators.

Registration

Training registration and payment are completed through our online registration system. Payments can be made by credit card or wire transfer. Once registration is complete, you will receive a training confirmation and a receipt. This course is offered as Instructor-Facilitated (group-live/group internet-based).

Questions? Contact the Training Support Team by submitting a case form on the [ServiceNow Support Portal](#).

Class Size

Public classes require a minimum of four students registered within seven days of the class start or they may be cancelled at OneStream's discretion. Once the registered class size reaches its limit (differs by location), it will be closed to additional students.

Continuing Professional Education Credits

OneStream LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website at: www.NASBARegistry.org.



24 CPE Credits are available for attending this course in the areas of Finance (16) and Information Technology (8). Contact the [Training Support Team](#) if you have interest in CPE Credits for this course.

Agenda

Day 1

- ✓ Cube Views
 - Advanced Member Filters and Time Functions
 - Dynamic Member Formulas
 - Relational Blending
 - Advanced Report Formatting and Conditional Formatting
 - Advanced Parameters and Bound Parameters
 - Linked Cube Views

Day 2

- ✓ Dashboards
 - Dashboard Layouts and Embedding Dashboards
 - Dashboard Designer
 - Parameter Components and Actions
 - Data Adapters using Cube View MD and Method Queries
 - BI Viewer Component

Day 3

- ✓ Dashboards
 - BI Designer and Dashboard Items
 - Advanced Dashboard Layouts
- ✓ Report Books
 - Book Components
 - Change Parameters
 - If and Else If Statements
 - Loops
- ✓ Extensible Documents
 - PowerPoint Template
 - Substitution Variables and Parameters
 - XCellFunctions
 - Reports and Charts

Student Cancellation

Please refer to the cancellation schedule listed below. If you cannot attend a training class, you are permitted to send another employee from your company at no additional charge or choose to have a credit made to your account to use toward a future class.

All cancellations, substitutions and modifications are completed via our online registration system.

Cancellation Schedule

14 or More Days

No charge; full refund

13 to 7 Days

50% of fee charged

Under 7 Days

Full fees charged; no refund