



ONESTREAM

CLASSROOM

Power User Reporting

Course Description

This two-day, hands-on course highlights the main reporting concepts in OneStream XF. This introductory class covers Cube View functionality and design for grid analysis and reporting, the building blocks of Dashboard Maintenance Units and Spreadsheet/Excel Add-In features such as Quick Views and Retrieve Functions.

Who Should Attend

OneStream XF Users who help build reports in OneStream but are not administering the entire application.

This course was designed for users who want to develop their reporting skills, but do not have a need for all the material in the four-day Application Build for Administrators. The Power User Reporting class covers the same reporting content as Application Build. Completion of this course allows users to attend Level 2 Reporting.

Registration

Training registration and payment are completed through our online registration system via the OneStream University website: www.onestreamsoftware.com/services/training. Payments can be made by credit card or wire transfer. Once registration is complete, you will receive a training confirmation and a receipt.

Upon training registration and payment, qualified OneStream Power Users will be given access to OneStream Academy, which is our online training video library. Academy access will be available within three business days from the time of registration, and login information will be emailed to the attendee via our Okta Administrator.

Upon logging into OneStream Academy, you will be directed to a Power User Learning Path. This Learning Path contains various training videos to be used as a resource while building reports in your application.

Complaints should be directed to training@onestreamsoftware.com or OneStream Support Portal at +1 (844) 663-3474.

Prior to Attending

We recommend viewing Modules 1 and 5 of the Application Basics course located in OneStream Academy. These modules provide a virtual overview introducing key OneStream concepts, background knowledge about OneStream XF and an overview of some of the features covered in the course.

Agenda

Day 1

- OneStream Software Overview
- Navigating OneStream
- OneStream Key Concepts
 - Dimensions
 - Cubes
 - Workflow Structure
 - Dimensions and POV
- Cube Views
 - Templates
 - Member Filters
 - Annotation Members
 - Calculated Columns and Rows
 - Standard and Conditional Formatting
 - Parameters

Day 2

- Spreadsheet/Excel Add-In
 - Quick Views
 - Using Cube Views in Spreadsheet
 - XF Retrieve Functions
- Dashboard Basics: Dashboard Maintenance Units
 - Data Adapters and Files
 - Components, including BI Viewer
 - Layout Types
 - Dashboard actions

Class Size

Public classes require a minimum of three 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 Software 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.learningmarket.org.

16 CPE Credits are available for attending this course in the areas of Finance and Information Technology. Contact training@onestreamsoftware.com if you have interest.

Program level is beginner.

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. If you need to do this, please adjust the name online in the registration system.

Cancellation Schedule

14 or More Days

No charge; full refund

13 to 7 Days

50% of fees charged

Under 7 Days

Full fees charged; no refund