



Power User Reporting

Course Description

This 1-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/training. Payments can be made by credit card. 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.

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

Agenda

Day 1

- Cube Views
 - Templates
 - Member Filters
 - Calculated Columns and Rows
 - Standard and Conditional Formatting
 - Parameters
- Dashboard Basics: Dashboard Maintenance Units
 - Data Adapters and Files
 - Components
 - Layout Types
- Spreadsheet/Excel Add-In
 - Quick Views
 - Using Cube Views in Spreadsheet
 - XF Retrieve Functions

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: www.learningmarket.org

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

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.

Student Cancellation

Please refer to the cancellation schedule 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.

14 or More Days

No charge; full refund

13 to 7 Days

50% of fees charged

Under 7 Days

Full fees charged; no refund