

Level 2 Reporting



Course Description

This three-day, hands-on course will cover advanced Member Filters, Dynamic Calculations and Formatting 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 will not cover reports built in OneStream Studio - Please review Academy content.

Who Should Attend

Only expert administrators who have experience creating OneStream Cube Views and Dashboards or advanced implementation services professionals should attend. All attendees should be very comfortable navigating OneStream, creating basic Cube Views using Member Filters and Expansions, and understand the concepts of a Dashboard Maintenance Unit. The program level of this course is intermediate.

Prerequisites and Advanced Preparation

This is an advanced class and does not review the content learned in Application Build for Administrators. Students should have attended the Application Build for Administrators class. As an alternative, the student must attend the two-day Power User Reporting course.

The following concepts must be understood to attend and be successful:

- Cube Views
 - Cube View Designer Navigation
 - Dimensionality and basic Member Filters and Expansions
 - Basic Cube View Formatting
- Dashboards
 - Dashboard Maintenance Units and basic navigation
 - Basic Data Adapters and Components

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.

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

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
 - XFCell Functions
 - Reports and Charts

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 training@onestreamsoftware.com if you have interest.



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