



**OS-300B: OneStream Certified Specialist (OCS)
Reports and Dashboards BETA Exam**

Beta Exam Study Guide v1.0

Exam Description

Candidates can validate their technical knowledge and competency by becoming a OneStream Certified Specialist Reports and Dashboards based on their specific area of expertise on OneStream 8.x. To achieve this level of certification, candidates must pass this online, proctored exam that is based on a combination of OneStream training material, commonly referenced product documentation, and real-world scenarios. This exam is comprised of both traditional multiple-choice items and performance-based items.

This exam targets IT professionals using OneStream in an Administration role. This certification exam measures candidate knowledge and skill covering the following topics:

- Workspaces
- Dynamic Reporting
- Cube Views
- Spreadsheet
- Dashboard Components

Recommended Experience

- 1+ year of Administration experience.
- 6 months experience with building reports and dashboards.
- Has experience/knowledge in areas of Accounting/Finance and/or Information Technology.

If candidates do NOT have prior experience with this product, it is recommended that they complete training, although training alone may not provide a candidate with the knowledge and skills required to pass the exam. If a candidate has experience with OneStream, they may find an online course equivalent to be sufficient. Be cautioned that attendance in a training course does NOT guarantee passage of a certification exam. A combination of training and successful, on-the-job experience are critical to providing candidates with the knowledge and skills needed to pass the exam.

What to Expect While Taking an Exam

The exam will be online and remotely proctored through video.

With the freedom to take a remotely proctored exam, it is the candidate's responsibility to ensure they have the necessary hardware (e.g., computer, large enough monitor, built in webcam or external USB webcam, power cords) and stable internet connectivity. Note that if a candidate chooses to use an external monitor instead of a laptop monitor, the candidate is responsible for providing their own external webcams for use during exam remote proctoring.

To aid in a successful testing experience, candidates should take these important steps to be sure that they will be able to take the test:

1. Government-issued IDs. You will need to show these to the proctor via webcam during authentication.
2. Computer or laptop.
3. PC or Mac connected to a power source.

- a. You must be allowed to download software to this computer.
- b. You must have a strong internet connection. We recommend a wired internet connection with a minimum of 5 Mbps download speed and 3 Mbps upload speed.

You must take these important steps to be sure that your computer or laptop are ready:

1. Use a supported browser: Chrome, Firefox, or Edge. (NOTE: Safari and Internet Explorer are unsupported.)
2. Verify you can complete this [5-question quiz](#) PRIOR to exam day.
3. Turn off your popup blocker. (Day of exam – if you may forget on the day of the exam, turn it off now while you are performing checks.).
 - a. If test-takers have their pop-up blocker enabled, there could be a delay when launching the exam session. When candidates select Connect to Proctor, that button initiates the screen share application. If that does not launch properly or immediately, it can feel as though the proctor is not available, though they are in the screen share session.
4. For best results, do NOT test on a work computer or Chromebook; there may be security configurations on your work computer that could affect exam performance.
 - a. If you experience issues using a company computer or sitting at work, ask your IT department to follow the instructions in [this guide](#), which may resolve the issues.
5. Verify your sound, camera, and microphone all function.
6. Webcams
 - a. It must be portable enough to scan the room. Your proctor will require a visual inspection of your workplace.
7. In addition to your computer, you must have a cell phone or tablet (for proctoring purposes ONLY).
 - a. You will need to make sure both the computer and cell phone/tablet are plugged in and charging during the exam. Audio must work on both devices.
8. Familiarize yourself with the proctor experience by reviewing the instructions in the [registration guide](#).

Prohibited Equipment

1. Use of cell phones and/or tablets for taking the exam is NOT allowed. They are to be used for proctoring purposes ONLY.
2. You must remove your smart watch, any listening devices (other than hearing aids), and check your pockets.

Dual monitors are NOT allowed for OneStream Certification Exams. However, due to the small size of laptop screens, external monitors are permitted if the laptop stays CLOSED. Two webcams are still required, so candidates must provide their own external webcams for the remote video proctored exam session to allow the proctor a full view of the candidate, and the candidate's surroundings, including the desktop.

Exam Objectives

The following tables list the OneStream Certified Specialist (OCS) Reports and Dashboards exam objectives and how these objectives align to the corresponding OneStream Navigator course topics and any associated lab exercises and commonly referenced product documentation.

Candidates are encouraged to complete applicable exercises as part of their preparation for the exam.

Exam Section 1: Workspaces (Weighting: 17%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> • 300.1.1: Recognize the importance of a Workspace 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Workspaces • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.1.2: Differentiate what is contained within a workspace 	<ul style="list-style-type: none"> • Course: Getting Started with OneStream <ul style="list-style-type: none"> • Lesson: Introducing the OneStream Platform • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Presenting Data with Books, Cube Views and Other Items; Workspaces
<ul style="list-style-type: none"> • 300.1.3: Examine the use of custom embedded dashboards 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapters: Dashboards; Dashboards for Budgeting, Planning and Forecasting • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.1.4: Troubleshoot dashboard problems 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Dashboards • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.1.5: Use a dynamic repeating component 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Dashboards • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items

Exam Section 2: Dashboard Parameters (Dynamic Reporting) (Weighting: 18%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> • 300.2.1: Differentiate the different Parameter Types 	<ul style="list-style-type: none"> • Course: OneStream Administration <ul style="list-style-type: none"> • Lesson: Application Properties and Dimensions • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.2.2: Describe how parameters are being used to apply the same format across multiple Cube Views 	<ul style="list-style-type: none"> • Course: OneStream Administration <ul style="list-style-type: none"> • Lesson: Application Properties and Dimensions • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.2.3: Analyze a Member List parameter expansion by leveraging the hierarchy 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapters: Fundamentals of Cube View Design and Build; Build Your Own Cube View • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Cube; Parameter Guides
<ul style="list-style-type: none"> • 300.2.4: Incorporate Dashboard Extender Business Rules 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Dashboards for Budgeting, Planning, and Forecasting • Press Book: OneStream Foundation Handbook <ul style="list-style-type: none"> • Chapter: Rules and Calculations • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Application Tools
<ul style="list-style-type: none"> • 300.2.5: Implement a solution that dynamically change the POV, Columns or Rows in Linked Cube Views 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapters: Taking Cubes to the Next Level; Build Your Own Cube • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.2.6: Understand the interlinking of parameters and Dashboards 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Dashboards • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Cube; Parameter Guides; Presenting Data with Books, Cube Views and Other Items

Exam Section 3: Cubes Views (Weighting: 23%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> • 300.3.1: Identify different Cube View properties and their use cases 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapters: One Place / Out of the Box Basics; Taking Cubes to the Next Level; Dashboards; Fundamentals of the Cube View Design and Build • Press Book: OneStream Foundation Handbook <ul style="list-style-type: none"> • Chapter: Reporting • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Cube; Parameter Guides; Presenting Data with Books, Cube Views and Other Items; Financial Model Guides; Navigating the Excell Add-In
<ul style="list-style-type: none"> • 300.3.2: Identify Cube View Formatting Features 	<ul style="list-style-type: none"> • Course: Building Basic Reports <ul style="list-style-type: none"> • Lesson: Formatting a Cube View • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Cube View Formatting • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.3.3: Analyze Intersections using Drill-Down/Drill-back feature 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapters: Cube View Concepts; Fundamentals of Cube View Design and Build • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: someplace Cube Views
<ul style="list-style-type: none"> • 300.3.4: Understand the use of XFBRs 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Dashboards for Budgeting, Planning, and Forecasting • Press Book: OneStream Foundation Handbook <ul style="list-style-type: none"> • Chapter: Rules and Calculations • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Application Tools; Presenting Data with Books, Cube Views and Other Items; Cube • Documentation: OneStream Solution Guide <ul style="list-style-type: none"> • Section: Compliance
<ul style="list-style-type: none"> • 300.3.5: Use sparse row suppression in a cube view 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Fundamentals of Cube View Design and Build • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> • 300.3.6: Add alternate language descriptions to a cube view 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Taking Cube Views to the Next Level • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Presenting Data with Books, Cube Views and Other Items; System Administration

Exam Section 4: Spreadsheet (Weighting: 12%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> • 300.4.1: Use Spreadsheet Reports 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapters: The Moving Pieces; What Have We Learned • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Table Views Guide; Navigating the Excel Add-In; Application Tools

Exam Section 5: Dashboard Components (Weighting: 20%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> • 300.5.1: Execute events in dashboards 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Dashboards for Budgeting, Planning, and Forecasting • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.5.2: Differentiate between which components to use for a given use case 	<ul style="list-style-type: none"> • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Section: Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.5.3: Evaluate a report built using Report Designer (Studio) in a dashboard 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Dashboards • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Presenting Data with Books, Cube Views and Other Items; Presentation
<ul style="list-style-type: none"> • 300.5.4: Use BI Viewer leveraged off a Data Adapter 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapters: Dashboards; Splash Screen and Home Pages • Documentation: OneStream Platform Guides <ul style="list-style-type: none"> • Sections: BI Blend Design and Reference

Exam Section 6: Other Reporting Components (Weighting: 10%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> • 300.6.1: Identify specific reporting types 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: The Moving Pieces • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Presentation Guides; Presentation; Presenting Data with Books, Cube Views and Other Items
<ul style="list-style-type: none"> • 300.6.2: Apply Changes to an Extensible Document 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: Taking Cube Views to the Next Level; What Have We Learned • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Presentation Guides; Navigating the Excel Add-In
<ul style="list-style-type: none"> • 300.6.3: Modify a Report Book 	<ul style="list-style-type: none"> • Press Book: Advanced Reporting and Dashboards <ul style="list-style-type: none"> • Chapter: The Moving Pieces • Documentation: OneStream Design and Reference Guide <ul style="list-style-type: none"> • Sections: Presentation; Presenting Data with Books, Cube Views and Other Items

For questions related to the certification process or exam, please open a case with Credentialing via the [ServiceNow Support Portal](#).

Special Thank You to Our Subject Matter Experts

- Charlie Griffiths, OneStream Software
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