

CLASS AGENDA

ONESTREAM ESSENTIALS

Building Basic Reports

Course Description

This three-day, Building Basic Reports course provides a live, hands-on overview of the basic concepts of creating and working with reports.

This includes: use cases for reporting in OneStream, connecting reports to application design, building a simple Cube, and using the Member Filter Builder. In addition, this course covers: Cube View performance, formatting, calculations, parameters, parameter types, Report Books, and Quick Views.

Learning Objectives

After completing this course, learners will be able to:

- ✓ List the use cases for reporting and report tools
- ✓ Explain how metadata and reporting is connected
- ✓ Build a simple Cube View
- ✓ Identify how the Member Filter Builder affects reporting
- ✓ Use simple calculations and parameters in reporting
- ✓ Create financial statements through report books
- ✓ Use Spreadsheet/Excel add-In to create reports

Who Should Attend

This course is intended for all users of OneStream responsible for creating or working with reports.

Prerequisites and Advanced Preparation

Prior to taking this course, you should have completed the following course, or possess equivalent knowledge:

- ✓ OneStream Essentials: Getting Started with OneStream

Prior to Attending Training

We recommend reviewing the OneStream Navigator content, for OneStream Essentials: Getting Started with OneStream in preparation for this course.

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). It is also available as an On-Demand course that contains access to our training server to complete the same exercises as the instructor-led version.

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

- ✓ Reporting and OneStream
- ✓ Connecting Reports to Application Design
- ✓ Building a Simple Cube
- ✓ Using the Member Filter
- ✓ Cube View Performance

Day 2

- ✓ Introduction to Formatting
- ✓ Building Calculations
- ✓ Applying Overrides
- ✓ Parameters Overview
- ✓ Parameter Types

Day 3

- ✓ Introduction to Report Books
- ✓ Adding Content to Report Books
- ✓ Quick Views
- ✓ Cube Views in Spreadsheet
- ✓ OneStream Retrieves

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