

OneStream Reporting and Analysis for the End User

1 Access and Navigation

- Overview of OneStream

- Access OneStream

- Change Applications

- Logoff OneStream

- Navigation

- Application Tray

- Navigation Pane

- Point Of View (POV) Pane

2 Cubes, Dimensions and Points Of View

- Overview of Cubes

- Overview of Dimensions

- Customizable Dimensions

- Fixed Dimensions

- Hierarchies and Relationships

- Audio Intelligence Dimensions

- Dimensions Assigned to the Financial Cube

- Entity Dimension

- Consolidation Dimension

- Scenario Dimension

- Time Dimension

- View Dimension

- Account Dimension

- Flow Dimension

- Origin Dimension

- IC Dimension

- User Defined Dimensions

- Point Of View (POV)

- Global POV

- Workflow POV

- Cube POV

- Save the Cube POV to Favorites

- Select a Dimension Member in the Cube POV

- Search for a Dimension Member

- Save the Cube POV to Favorites

- Use a Saved Cube POV

OneStream Reporting and Analysis for the End User

3 Overview of Spreadsheet

Spreadsheet Overview

OneStream Ribbon in Spreadsheet

Quick View Pane

4 Create XF Retrieve Worksheets

Overview

Design Considerations

OneStream Spreadsheet

OneStream XF Functions

Common XF Functions

Select Dimension Members

Select Member Options

Hierarchy Tab

Search Tab

Create an XFGetCell Function Worksheet

Lay Out the Dimensions on the Worksheet

Select Dimension Members

Create the XFGetCell Function

Verify Cell References

View the Function Arguments

Copy Formulas

XFGetMemberInfo Function

XFGetMemberProperty Function

XFGetFxRate Function

Save Offline Copy

5 Create Quick Views

Overview

Set Preferences

Set Default Members for New Quick Views

Create a Quick View

Quick View Shortcut Icons

Dimension Members in a Quick View

Select POV Dimension Members

Select Row and/or Column Dimension Members

Dimension Member Relationships

OneStream Reporting and Analysis for the End User

- Move Dimensions from POV to Rows or Columns
- Move Dimensions from Rows or Columns to the POV
- Delete a Quick View
- Drill Down in a Quick View Worksheet
- Type In Functionality
 - Using Member Expansion Functions
 - Adding Comma Separated Members
 - Adding a New Dimension Member to an Existing Quick View
- Advanced Quick View Topics

6 Open a Cube View in Spreadsheet

- Overview
- Remove the Cube View Connection
- Drill Down in a Cube View
- Convert a Cube View to an XFFGetCell Worksheet