Sheets™ for OneStream
User Guide

Sheets™ for OneStream User Guide

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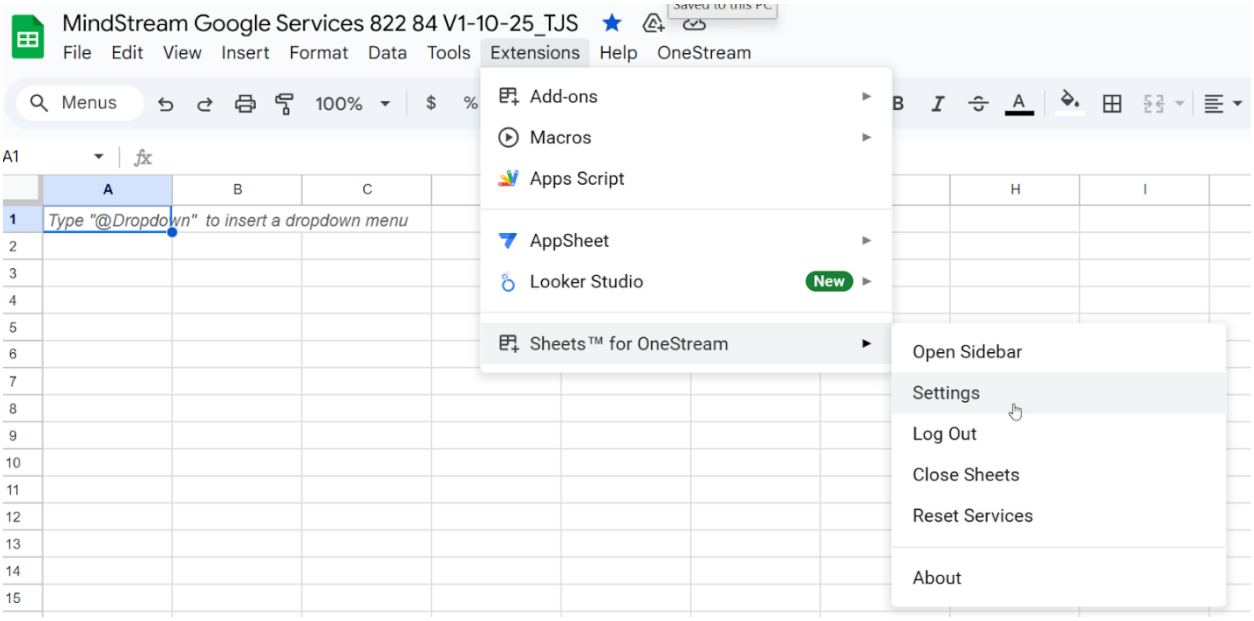
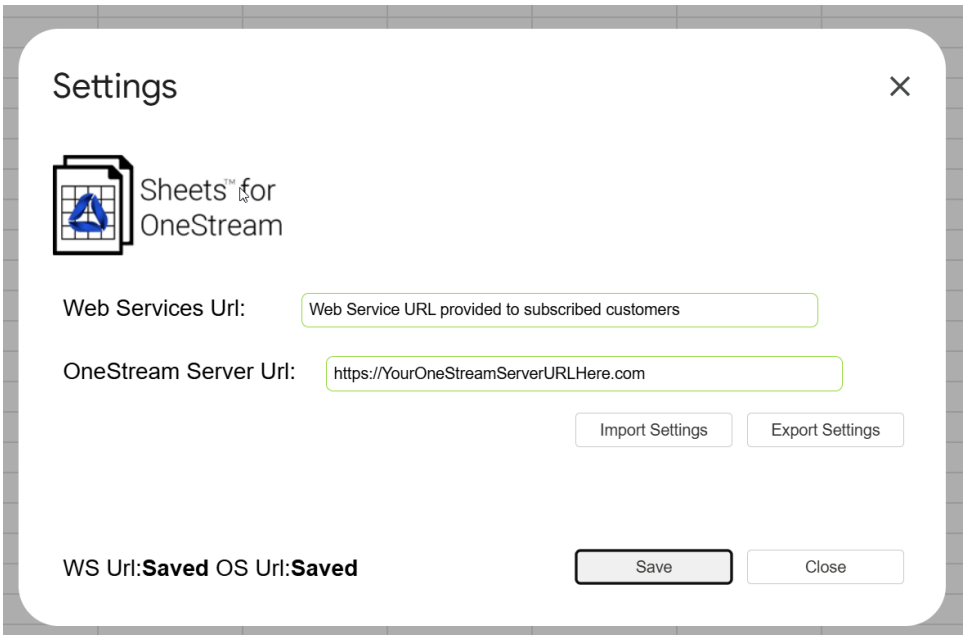
Settings

Click Extensions -> Sheets™ for OneStream -> Settings in the OneStream menu:



Add URLs for the OneStream application and the Planning and Consolidations for OneStream Web Service:

Web Service	Web Service URL provided to subscribed users
OneStream Server	https://youronestreamserverurlhere.com

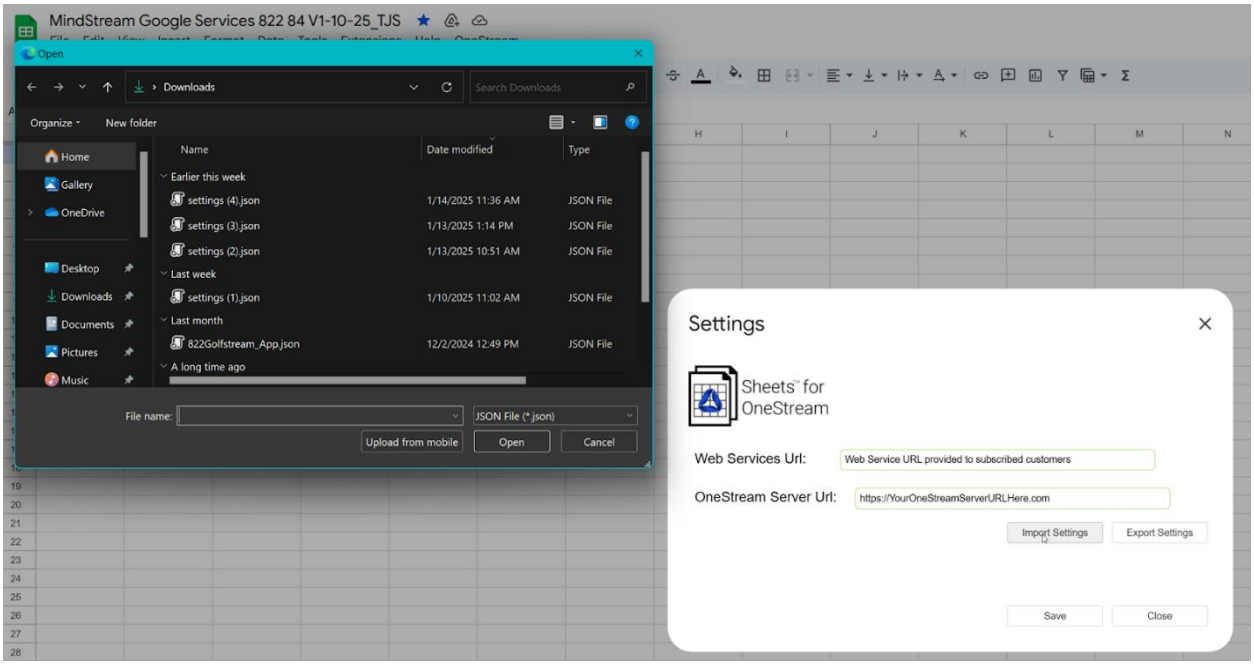


Click “**Save**”, then click X or the **“Close”** button to close.

Import Settings

Alternatively, Sheets™ for OneStream also allows the option to Import or Export your web services settings, making configuration even easier between sessions.

To start, from the Settings menu, click the **“Import Settings”** button.

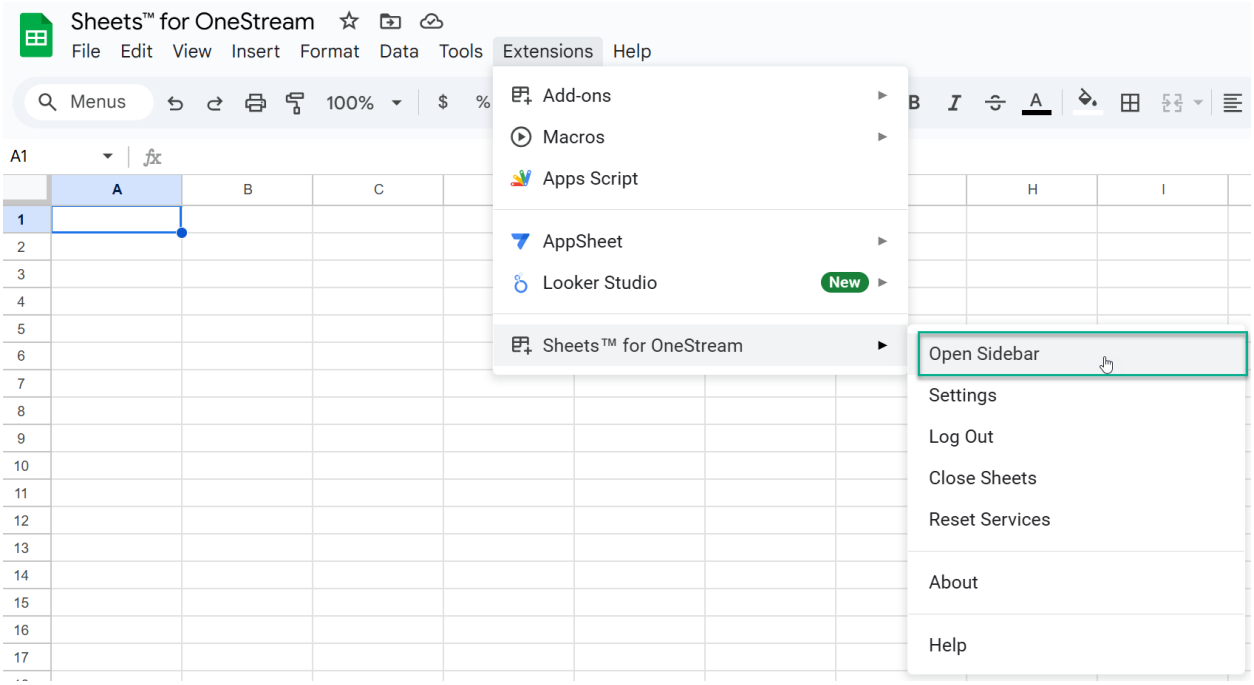


Your local file system will then open, allowing you to select any file containing your web services settings and applies them to the appropriate text field.

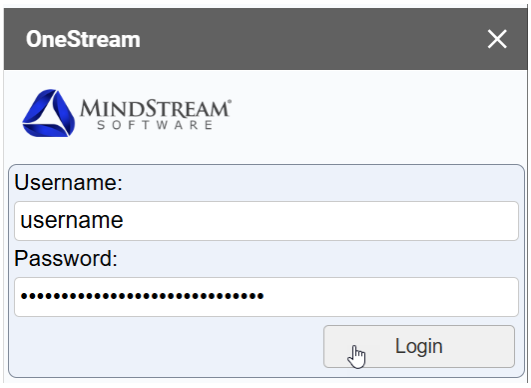
When finished importing, click "**Save**", then click X or the **"Close"** button to close.

Login

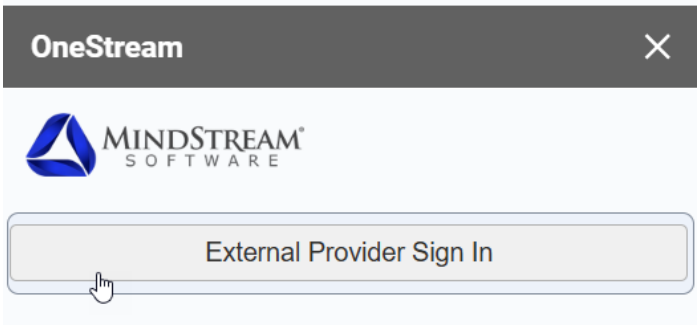
Navigate to Extensions -> Sheets™ for OneStream -> Open Sidebar



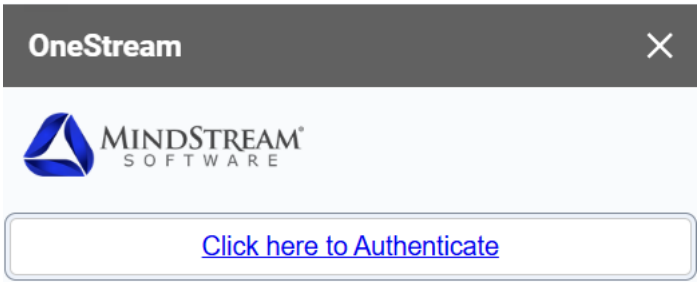
Type your OneStream user credentials in the appropriate fields and click **"Login"**:



If your OneStream server uses third party authentication, you will be prompted to authenticate your credentials using your third party provider, please do so by clicking the **"External Provider Sign In"** button.

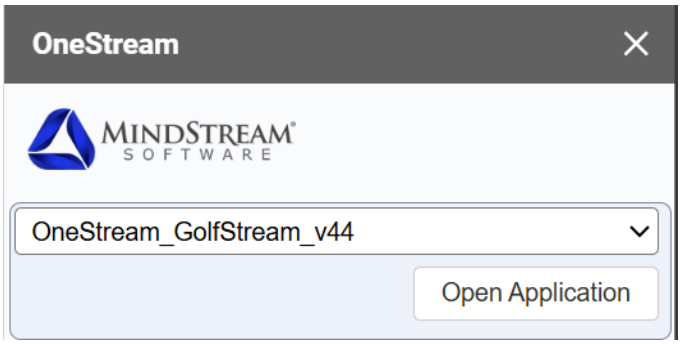


After signing in with third party authentication, click the **"Click here to Authenticate"** button to proceed to Sheets™ for OneStream.



Select Application

Once logged in, you will be prompted to select an application from your list of internal OneStream applications. Please select from the dropdown the application you wish to open, then click **"Open Application"**:

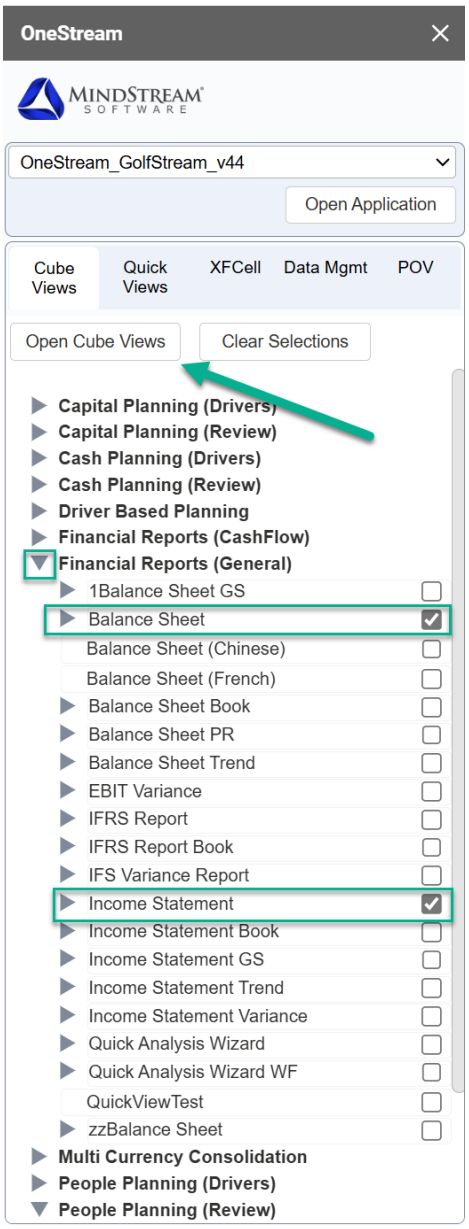


Cube Views

You will be presented with a tabbed sidebar. (This takes a few seconds to load)

Under Cube Views, the bold sections of the Cube View tree are Cube View Profiles specific to your OneStream application, and reflect a similar hierarchical structure (OnePlace Cube Views in OneStream) with the Cube Views underneath the bold Cube View profiles.

To expand a Cube View Profile, click the arrow to the left of the Cube View Profile name.

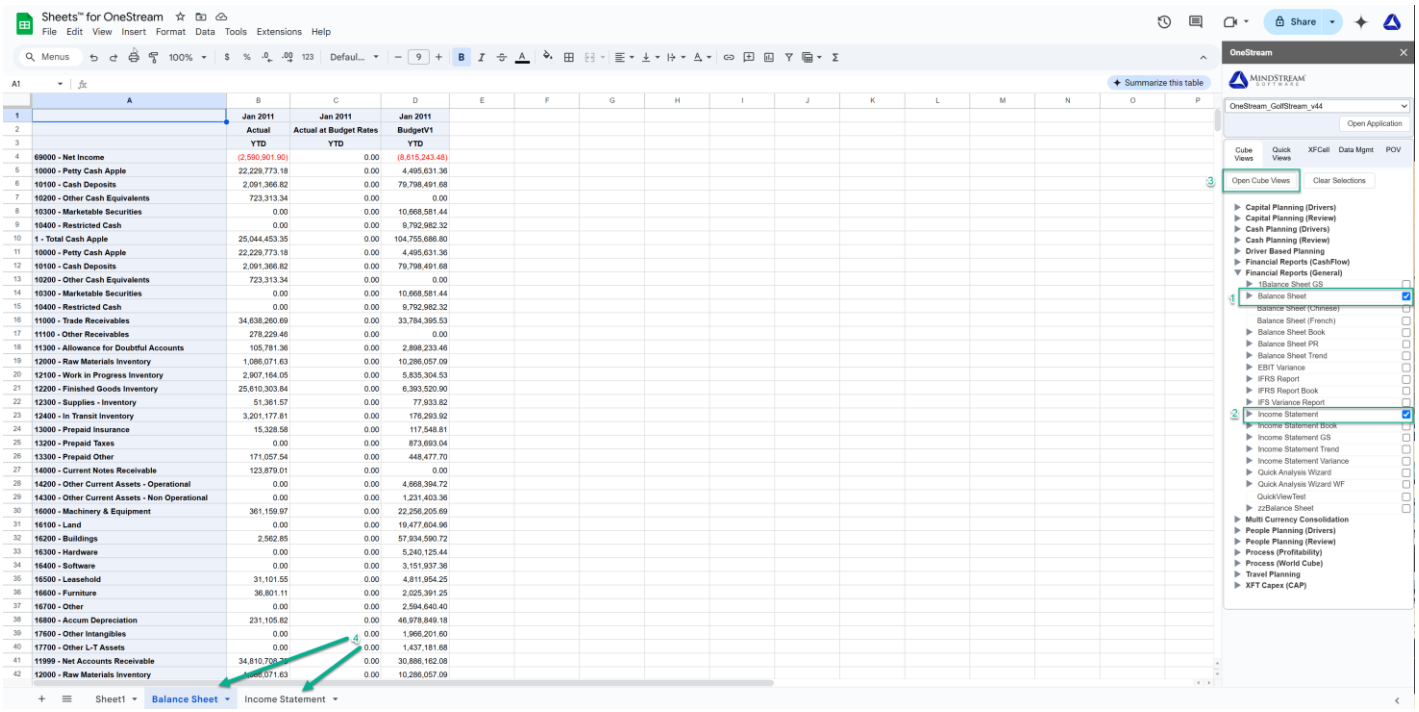


Expanding the Cube View Profile will show a list of your Cube Views. Sheets™ for OneStream allows multiple cube views to be opened at once, each within their own sheet.

Cube Views (without Parameters)

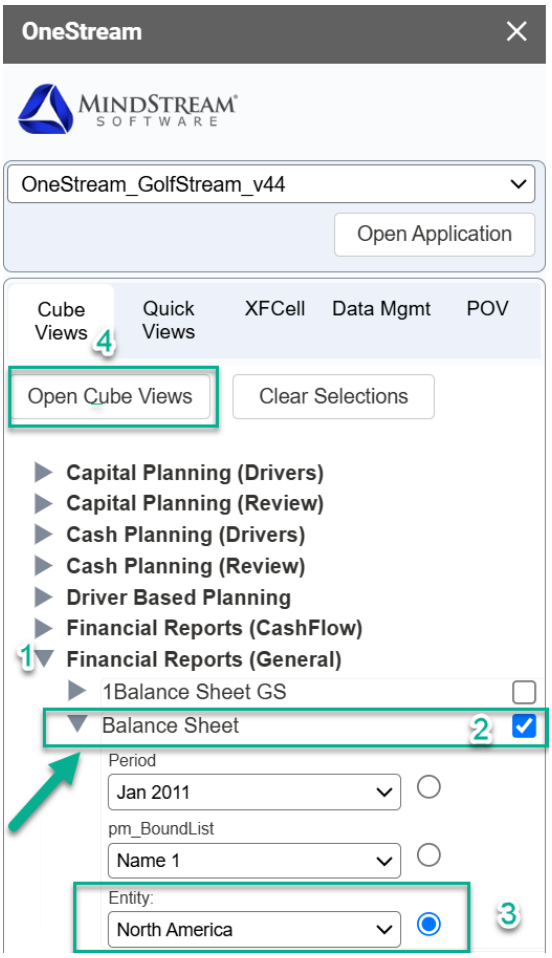
- With the Cube View Profile list expanded (if applicable), click in the checkbox next to the names of the Cube Views you wish to open, then click **“Open Cube Views”**.
- To clear any checked Cube Views you do not wish to open, click the **“Clear Selections”** button.

The reports will open as sheets:

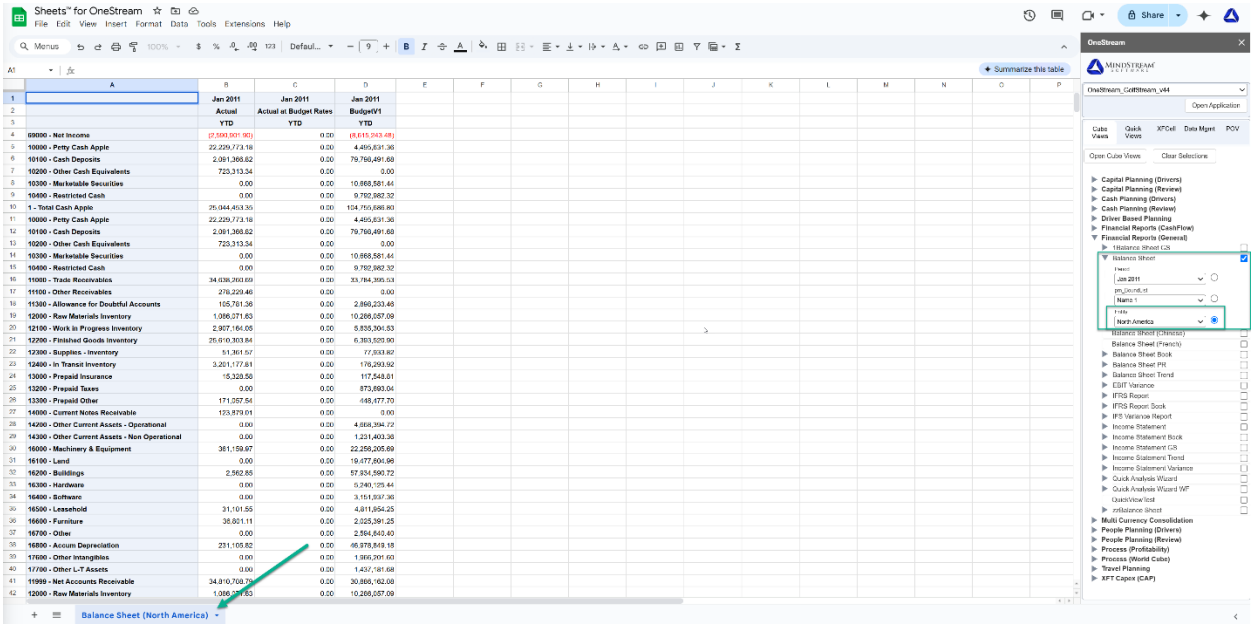


Cube Views with Parameters

- Cube Views that have parameters will also have an additional arrow after expanding the Cube View Profile list. Click on the arrow to the left of the Cube View name to utilize your defined Cube View parameters.
- Next, click in the radio button with the Cube View name checked as well, and click **“Open Cube Views”** to run a Cube View(s) with your selected parameters. In this example, I am running the Balance Sheet Cube View with Entity: North America as the parameter.



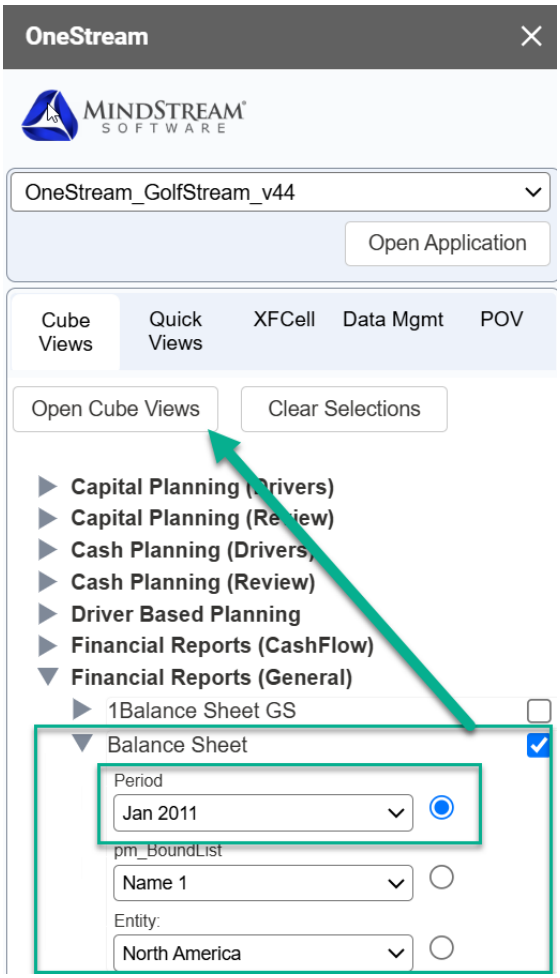
The result is a new sheet containing the Balance Sheet (North America) Cube View report:



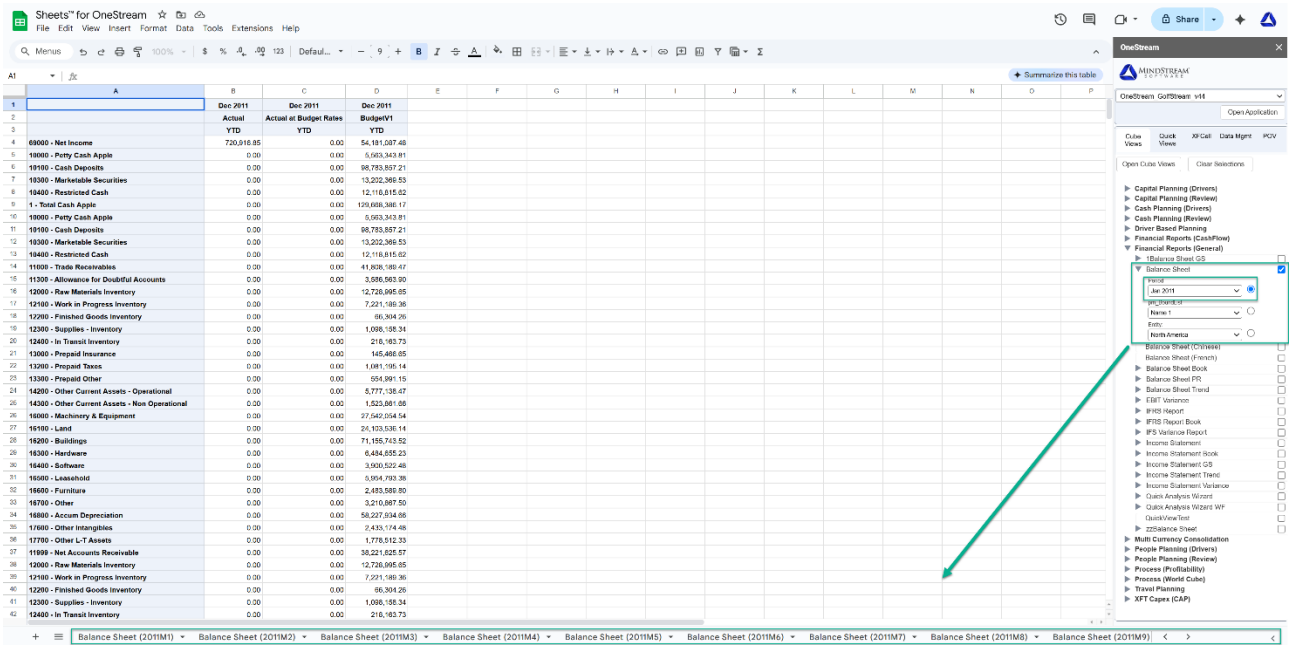
Cascading Cube Views

Sheets™ for OneStream allows for Cube Views to be cascaded based upon a parameter such as Period (which we will use for this example).

- Expand the Cube View you wish to cascade by clicking the arrow to the left of the Cube view name.
- Click the radio button to the right of the parameter you wish to cascade (i.e. Period) and click the **"Open Cube Views"** button.



- Each Cube View will be cascaded by period and open in their own separate sheet



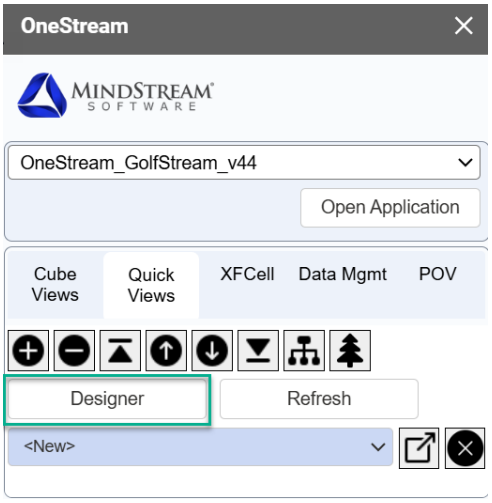
Ad Hoc Reports and the Ad Hoc Report Designer

The Ad Hoc Reports tab in Sheets™ for OneStream offers users the ability to make Ad Hoc Reports on demand, and the ability to save, edit, delete or export an Ad Hoc Report. The Ad Hoc Reports tab also offers drill button functionality, which will we go more in depth on in the Ad Hoc Report Drill Buttons section.

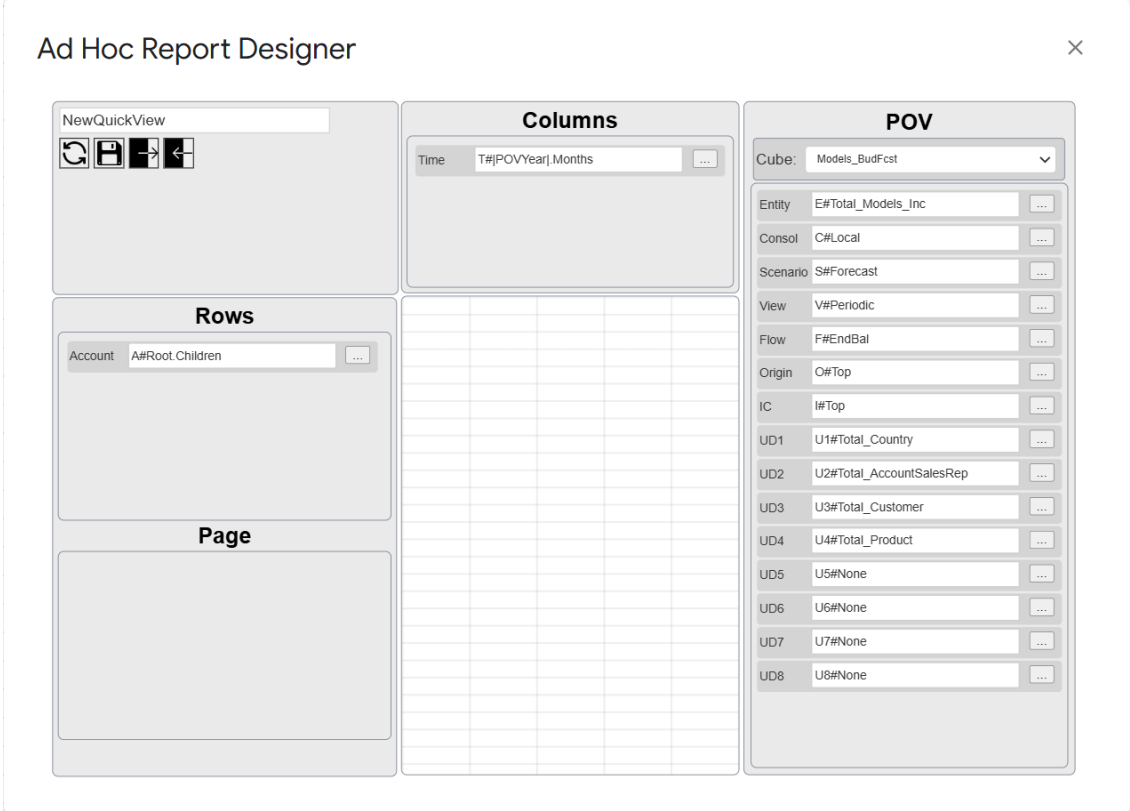
Create a New Ad Hoc Report

From the Ad Hoc Reports tab:

- Click the **"Designer"** button. (Allow a few moments for the Designer window to open)



- The Ad Hoc Report Designer will automatically populate the POV fields with their appropriate members, based on your defined POV in OneStream.



- The Ad Hoc Report Designer supports drag and drop functionality. You can drag and drop any of the POV members into the Rows, Columns, or Page sections.
- As an example, Time was drag and dropped to the Columns section, while Account was drag and dropped to the Rows section.
- To drag and drop, simply left click and remain holding as you drag the POV member to the section of the Ad Hoc Report Designer you wish to place it in, then release the mouse button.
- After releasing the mouse button, you will see the POV member you drag and dropped in the section you wish to view it within your Ad Hoc Report.

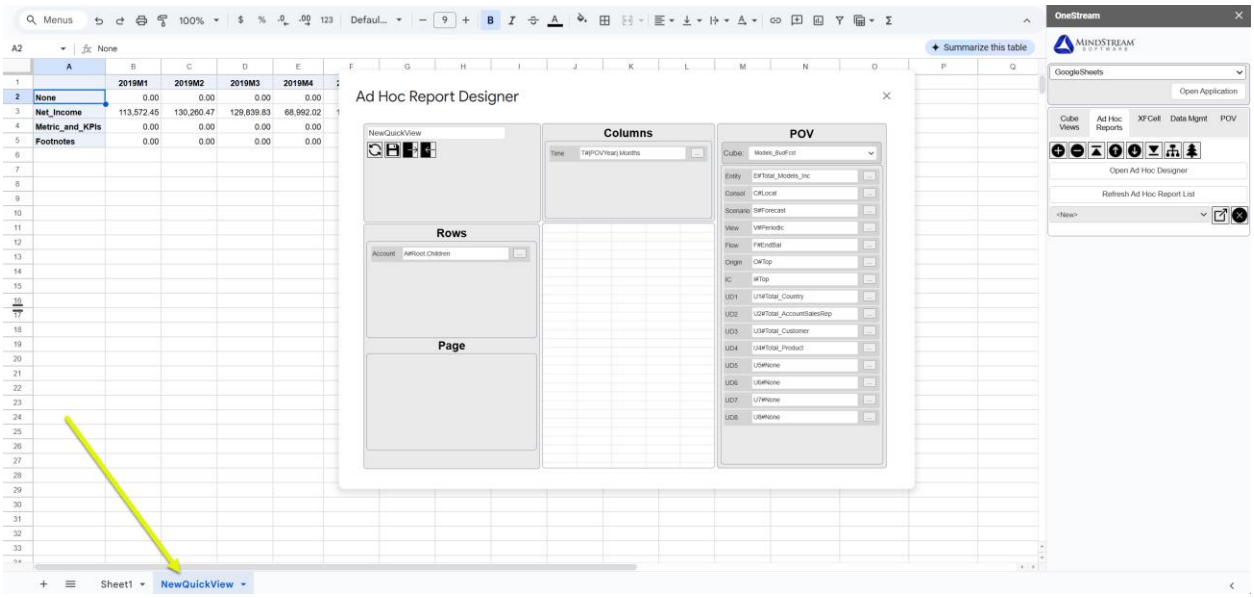
Save an Ad Hoc Report

From the opened Ad Hoc Report Designer window:

- After selecting your POV, Columns, and Rows selections, type in a name for your Ad Hoc Report in the text field at the top left corner of the Ad Hoc Report Designer window (NewQuickView will be the automatically generated Ad Hoc Report name upon default if name is not changed).

- Click the **“Save”** icon underneath your Ad Hoc Report name text field (a throbber cube will display to indicate the Ad Hoc Report is saving and opening in a new sheet)

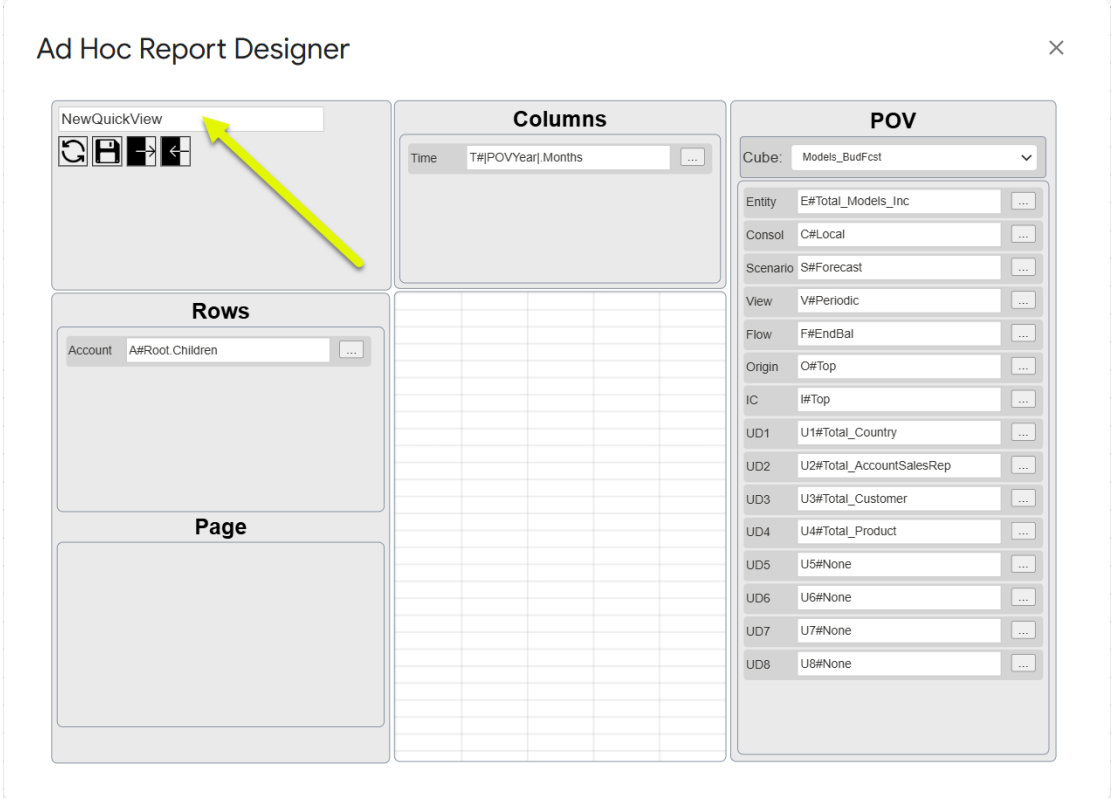
- The Ad Hoc Report you created will open after saving is completed in its own sheet.



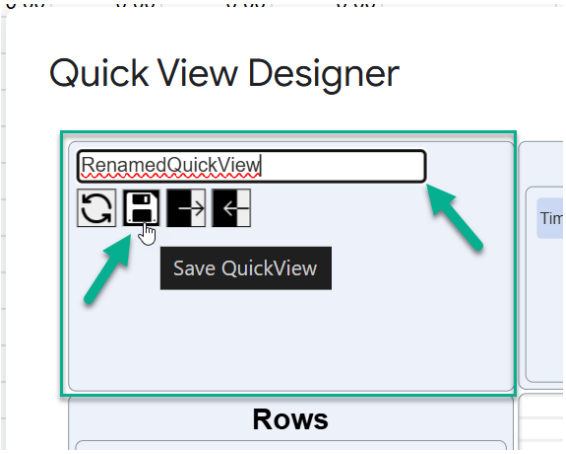
Rename an Ad Hoc Report

The Ad Hoc Report Designer makes renaming an Ad Hoc Report very simple. To do so:

- Open the Ad Hoc Report Designer
- Navigate to the text field in the top left corner of the Ad Hoc Report Designer window and click inside using your cursor (The text box will add a black border to indicate you have entered the input field and your cursor will change from default to a blinking cursor)



- Replace the text currently in the field with what you wish to rename your Ad Hoc Report
- Click the **"Save"** icon

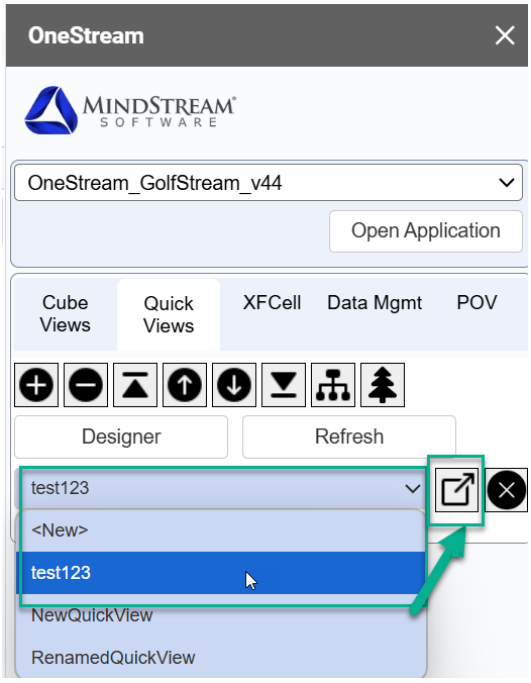


- The Ad Hoc Report you renamed will open after saving in its own sheet.

Open a Saved Ad Hoc Report

To open a saved Ad Hoc Report:

- Navigate to the Ad Hoc Reports tab in the Sidebar
- Locate the dropdown menu at the bottom of the Ad Hoc Reports tab
- Click in the dropdown menu to expand it
    - All of your saved Ad Hoc Reports will display in the dropdown
- Click the name of the saved Ad Hoc Report you wish to open, which will highlight the name and close the dropdown upon selection
- Click the **"Open Ad Hoc Report"** icon to the right of the dropdown menu

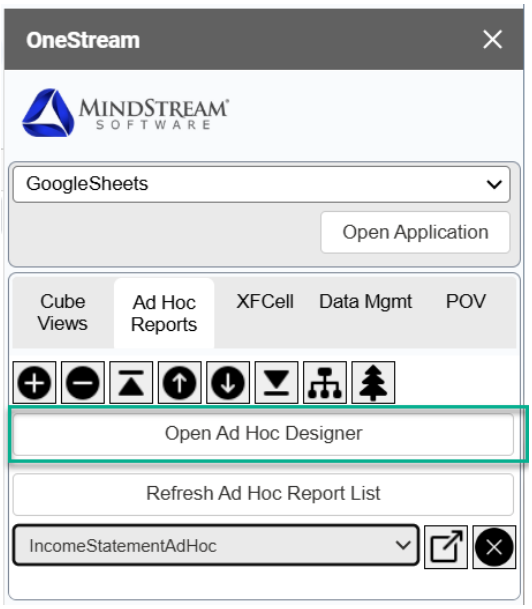


- The saved Ad Hoc Report is opened in its own sheet

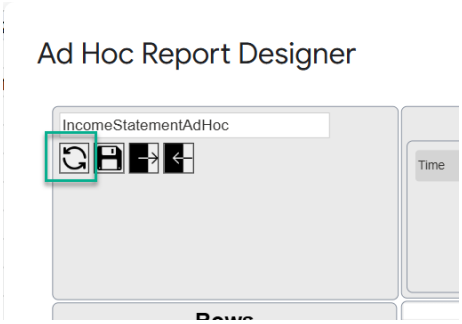
Update a Saved Ad Hoc Report

To update/make changes to a saved Ad Hoc Report:

- Open the saved Ad Hoc Report you wish to update (Refer to previous section "Open a Saved Ad Hoc Report" for step by step instructions if needed)
- With the saved Ad Hoc Report sheet open, click the **"Designer"** button in Ad Hoc Report tab



- Make any needed updates or changes in the Ad Hoc Report Designer, then click the **"Refresh"** button in the Ad Hoc Report Designer

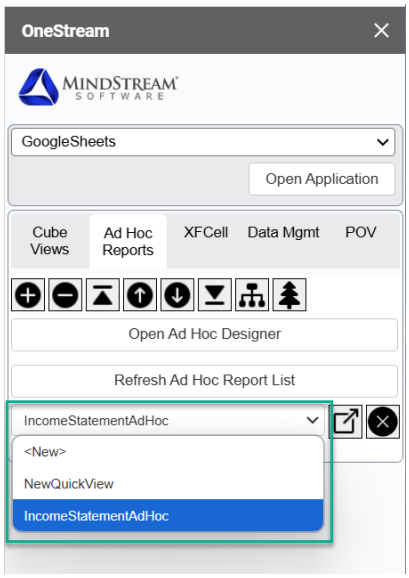


- The sheet associated with the updated Ad Hoc Report will be refreshed to reflect your changes and updates, and also will be saved to your Ad Hoc Report for future use

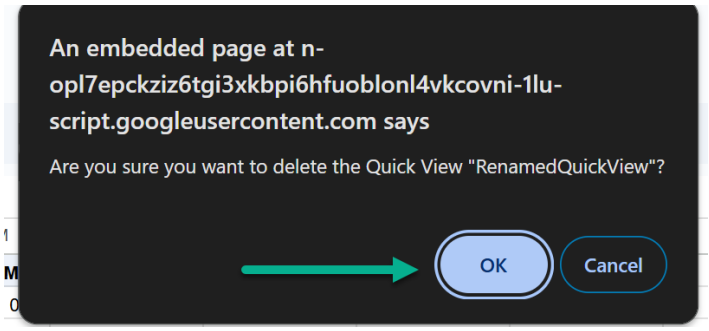
Delete a Saved Ad Hoc Report

To delete a saved Ad Hoc Report:

- Navigate to the Ad Hoc Reports tab in the Sidebar
- Locate the dropdown menu at the bottom of the Ad Hoc Reports tab
- Click in the dropdown menu to expand it
    - All of your saved Ad Hoc Reports will display in the dropdown
- Click the name of the saved Ad Hoc Report you wish to delete, which will highlight the name and close the dropdown upon selection



- Click the **“Delete Ad Hoc Report”** icon to the right of the dropdown menu
- A confirmation window will display to confirm you wish to delete the selected Ad Hoc Report, click **“Ok”**



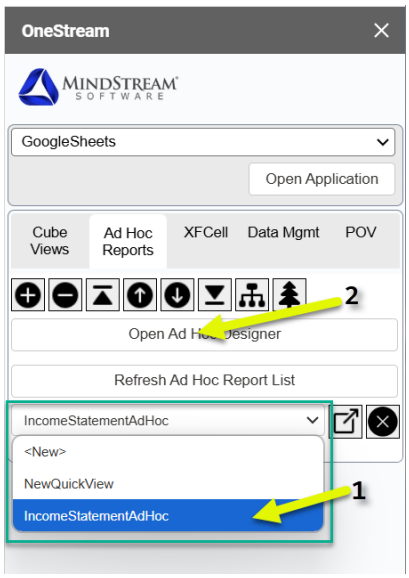
- The saved Ad Hoc Report is deleted and no longer displays in the dropdown

Export an Ad Hoc Report

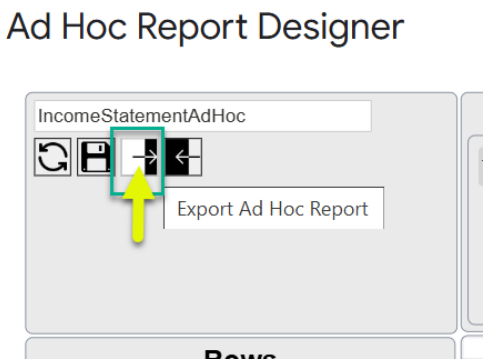
Sheets™ for OneStream allows users to export their saved Ad Hoc Reports to their local file system for use between other team members, sessions, etc.

To export an Ad Hoc Report:

- Navigate to the Ad Hoc Reports tab in the Sidebar
- Locate the dropdown menu at the bottom of the Ad Hoc Reports tab
- Click in the dropdown menu to expand it
    - All of your saved Ad Hoc Reports will display in the dropdown
- Click the name of the saved Ad Hoc Report you wish to export, which will highlight the name and close the dropdown upon selection
- Click the **"Open Ad Hoc Report"** icon
- Once the saved Ad Hoc Report has opened, click the **"Designer"** button



- Once the Ad Hoc Report Designer window has opened, navigate to the top left corner and click the **"Export Ad Hoc Report"** button



- The Ad Hoc Report will be saved as a .qvd file to your local file system
    - Most browsers default to the “Downloads” folder upon exporting to your local file system

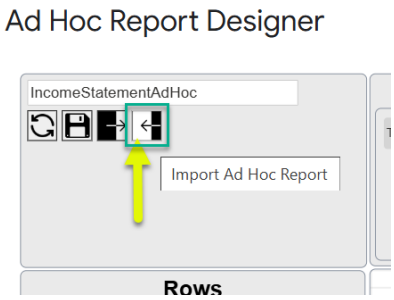
Import an Ad Hoc Report

Sheets™ for OneStream allows users to import saved Ad Hoc Report files from their local file system directly into the Ad Hoc Report Designer to make creating an Ad Hoc Report even faster.

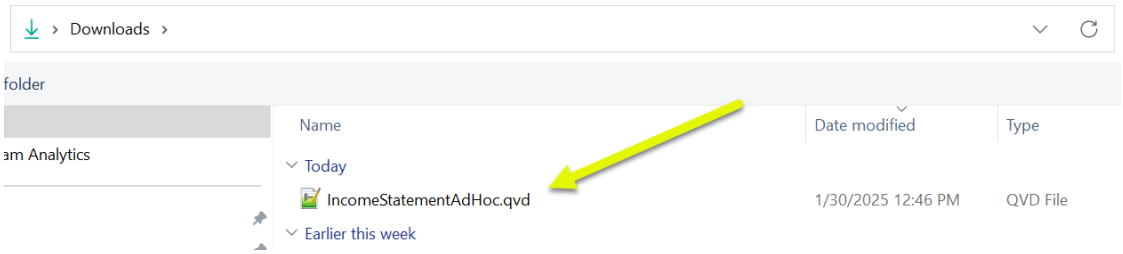
Note: only .qvd files will import successfully into the Ad Hoc Report Designer. As a prerequisite, please create and export an Ad Hoc Report from the Ad Hoc Report Designer to your local file system.

To import an Ad Hoc Report:

- Navigate to the Ad Hoc Reports tab in the Sidebar
- Click the **“Designer”** button
- Locate the **“Import Ad Hoc Report”** icon at the top left of the Ad Hoc Report Designer window and click it



- Your local file system will open – select the associated file name of the Ad Hoc Report you wish to import and click **“Open”**



- The Ad Hoc Report designer will populate all fields based upon the imported file
- Click the **“Save”** icon at the top left corner

- The imported Ad Hoc Report is now saved to Sheets™ for OneStream for future use and can be opened at any point from the dropdown menu in the Ad Hoc Reports sidebar tab

Ad Hoc Report Drill Buttons

Apart from the Designer, the Ad Hoc Reports tab in Sheets™ for OneStream offers drill button functionality to use on any header cell within a Sheet in Sheets™ for OneStream. These cells do not need to be defined in an Ad Hoc Report, unlike with the OneStream Excel Add-In.

Please refer to the table below for all Ad Hoc Report Drill Button functionality and their corresponding icons/UI element:

Capability/Functionality	**Sheets™ for OneStream QV Drill Button Icons/Designer Equivalent**
Keep Only	
Remove Only	
Drill Top	
Drill Up	
Drill Down	
[Shift][Control]-Click - Drill Down Inclusive, retains drilled member	
[Shift][Control]-Click to retain the parent as a total(inverted)	
Drill to Base	
Drill to Descendants	
[Shift]-Click Drill – Descendants Inclusive, retains drilled member	
Drill to Tree Descendants	Descendants are listed and indented to show their relationships in the hierarchy

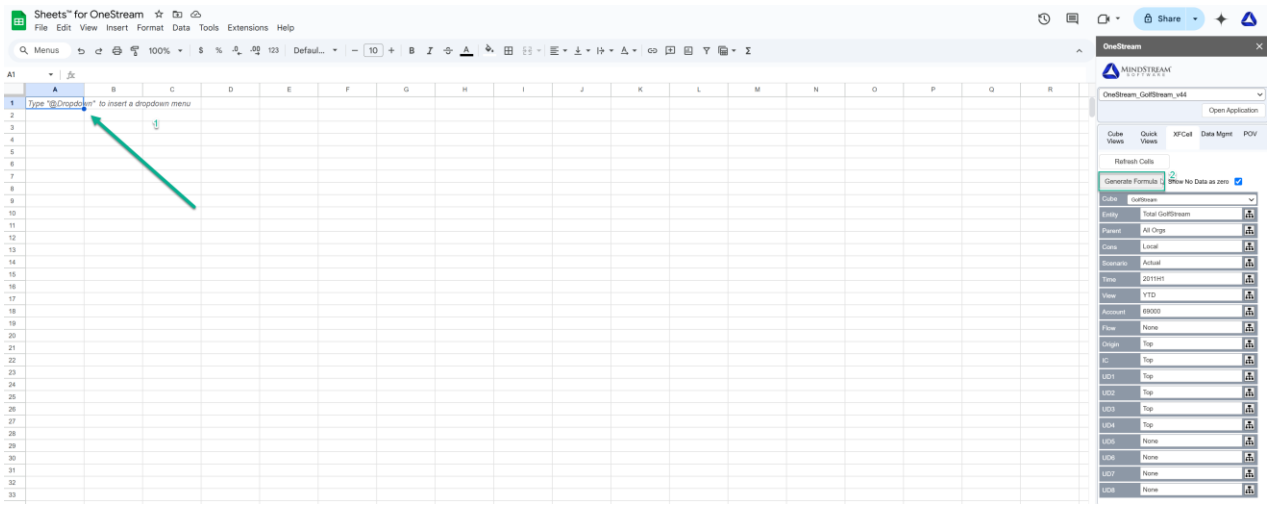
[Shift]-Click: Drill – Tree Descendants Inclusive	
[Control]-Click: Drill – Tree Descendants Inclusive, Inverted (parents, ancestors are totals)	
[Control][Shift]-Click : Drill – Tree Descendants, Inverted (parents, ancestors are totals)	

XFCell

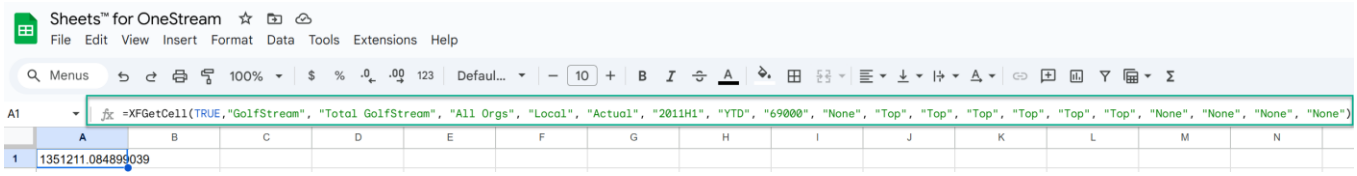
Generate Formulas

Formulas can be generated in any sheet within Sheets™ for OneStream, and within any cell you select. To generate a formula:

- Click the XFCell tab in the Sheets™ for OneStream sidebar
- Select members for each of the visible POV items (or you can leave as is by using the default POV – the default POV in your OneStream application will also be the default POV in Sheets™ for OneStream)
- Navigate to a sheet you wish to generate a formula in
- Select the cell you wish to generate your formula by clicking inside of it (cell will have a blue outline)
- Navigate back to the XFCell tab in the sidebar and click the **“Generate Formula”** button



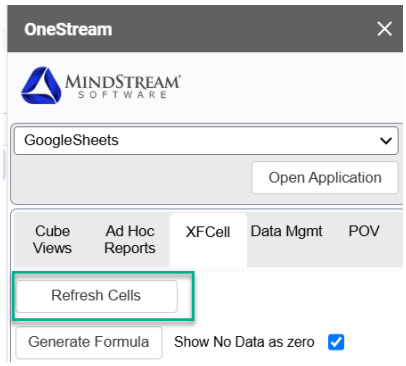
- With the cell still highlighted, you may see data populate in the cell you generated the formula for (if applicable)
- Locate the formula bar at the top of the page just below the navigation menu
- The formula bar will reflect the formula you have generated based on your POV member filters



Refresh Cells

The **“Refresh Cells”** button can be used to make changes to an existing formula within a cell and load the latest data. To Refresh Cells:

- Navigate to a cell that already has a generated formula and click in the cell to highlight it
- In the XFCell tab in the sidebar, click the **“Refresh Cells”** button



- Your formula will be updated with the latest data

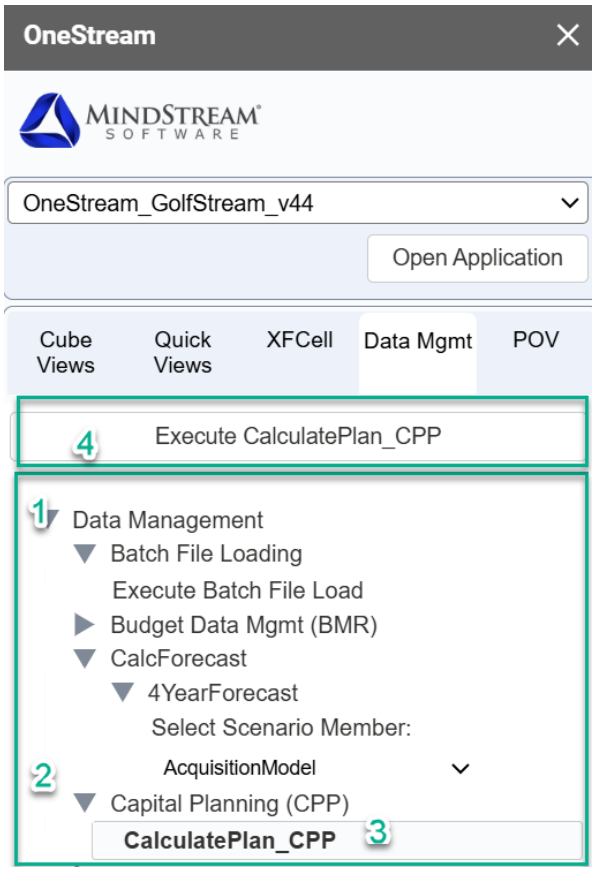
Data Management

From the first time you login using Sheets™ for OneStream, all your data management jobs will be organized by data management group (set up in your internal OneStream application) within the Data Mgmt tab within the Sheets™ for OneStream sidebar.

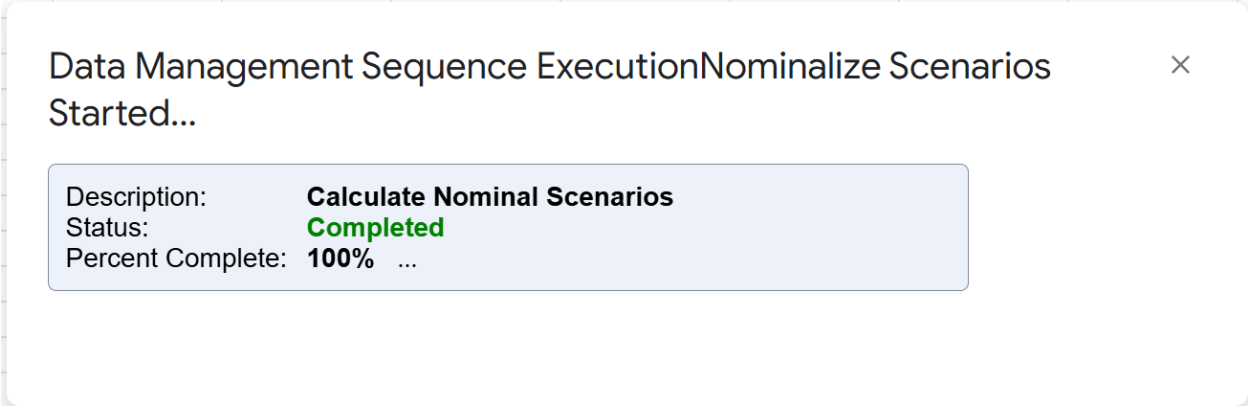
Execute a Data Management Job

To execute a Data Management Job:

- Navigate to the Data Mgmt tab in the Sheets™ for OneStream sidebar
- Locate the associated Data Management group containing the Data Management job you wish to run
- Click the arrow icon to the left of the Data Management group name to expand the tree
- With the tree expanded, find and click on the name of the Data Management job
- A line of text will populate underneath the name of the DM job that will appear as "Execute Name of DM Job", click on that text
    - "Execute Name of DM Job" will now be bold and outlined
- Click the button at the top the Data Mgmt tab that says **"Execute Name of DM Job"**



- Once you have started execution of the DM job a window will open that display the description, status, and percent complete of the DM job



Note: DM jobs execute in the background, therefore you do not need to keep the execution window open and can close it after execution has started.

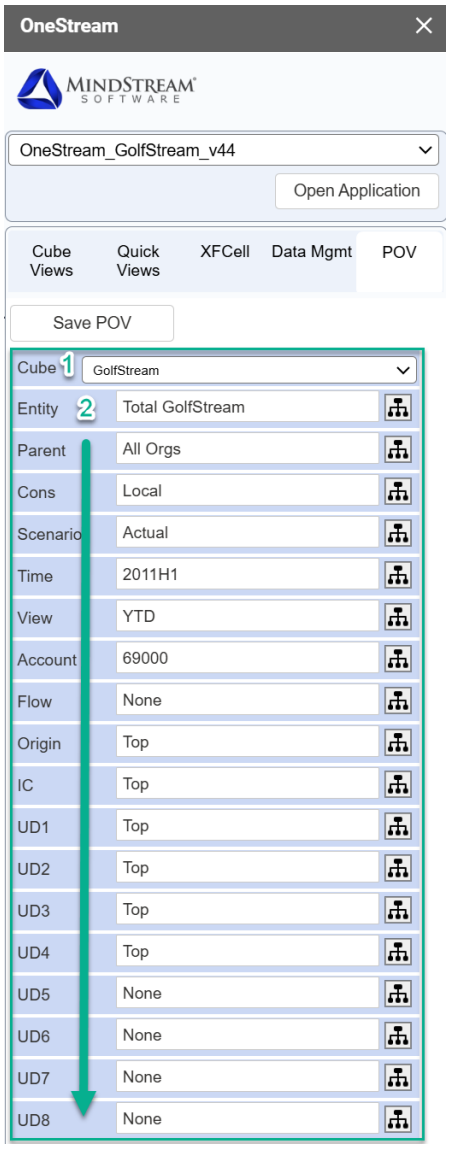
POV

The point of view, or POV tab, within Sheets™ for OneStream will automatically fetch the current POV defined in your OneStream application. This POV gets reused within the Ad Hoc Report Designer and XFCell tabs, and can be modified on the fly to reflect any members or dimensions you wish to retrieve data from.

Change POV

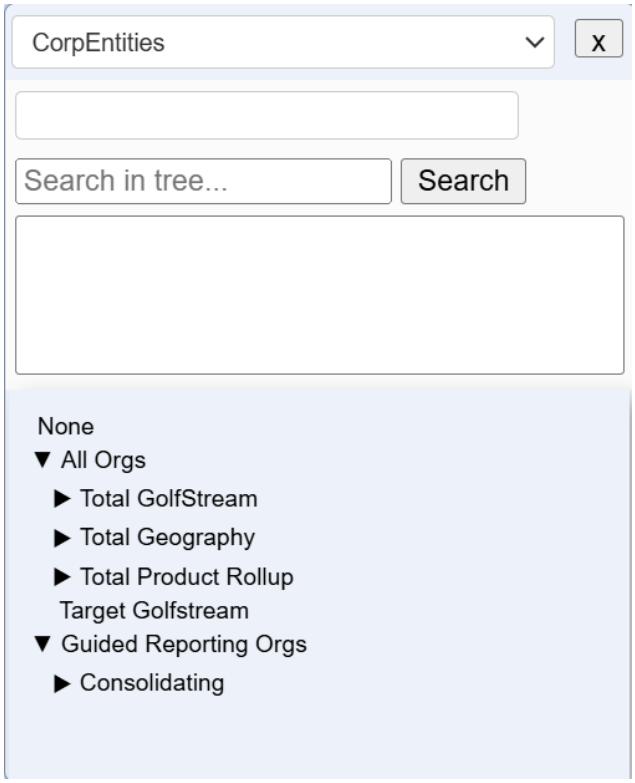
Changing the POV is simple with Sheets™ for OneStream. To do so:

- Navigate to the POV tab in the sidebar
- Select the Cube you wish to use for POV from the “Cube” dropdown menu at the top
- Click the icon/button to the right of any dimension listed under POV

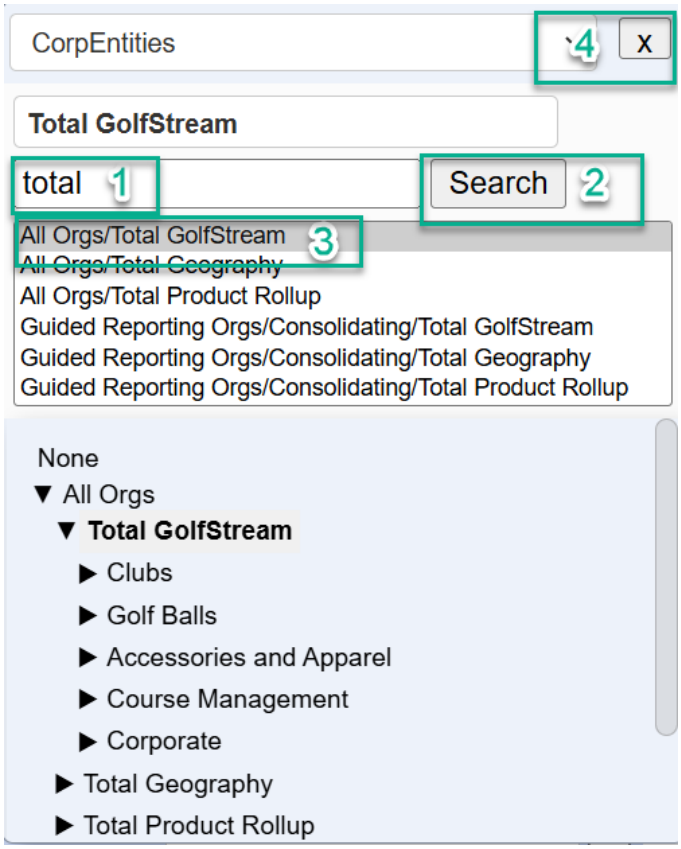


Member Filter Search

- Clicking the icon/button to the right of any dimension listed under the POV will open the Member Filter Search window



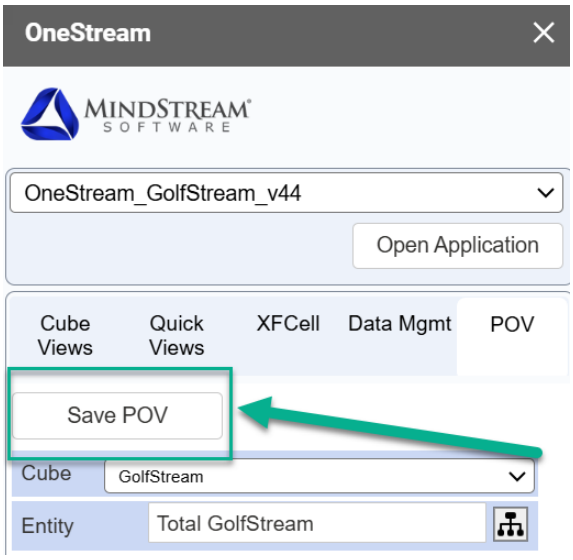
- The Member Filter Search window operates the same way the member filter builder in OneStream does – allowing you to select directly from the dimension hierarchy at the bottom of the window, or to type and search for a member in the search field
- To search for a member, type in the name of the member you are looking for in the search field and click the “Search” button
- All matching member results will display in the text box below the search field
- Select the member you wish to use. The member will now be highlighted to indicate selection
- Double click the highlighted member to add it to the member field at the top
- When you have finished with your selections in the Member Filter Search, click the **“X”** button at the top right to return to the POV tab



Save POV

After making all POV member selections:

- From the POV tab in the sidebar, click the “Save POV” button at the top left
- Your POV changes will save and be updated for use in Ad Hoc Reports, Ad Hoc Report Designer, XFCell, and Data Mgmt tasks.

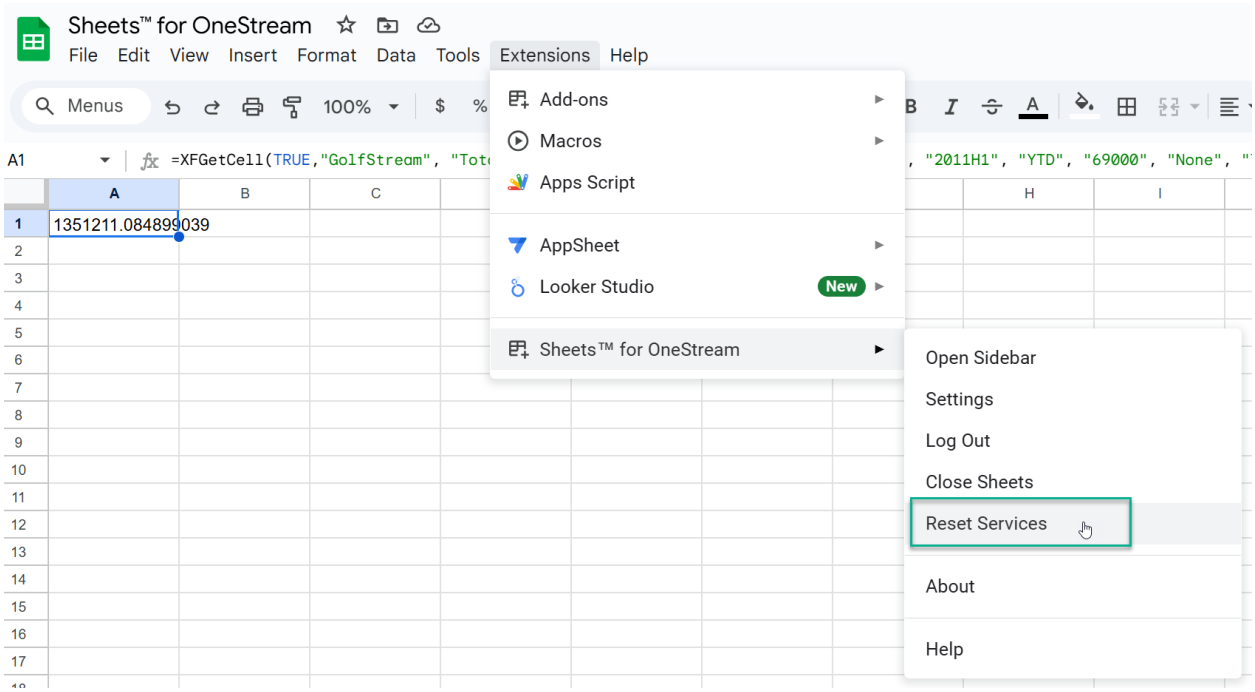


Misc

Reset Services

In some cases, you may make a change in your OneStream application that does not reflect over into Sheets™ for OneStream. When this happens, utilizing the Reset Services function will refresh Sheets™ for OneStream with the latest data, changes, etc. from your internal OneStream application. To Reset Services:

- Click on Extensions -> Sheets™ for OneStream -> Reset Services

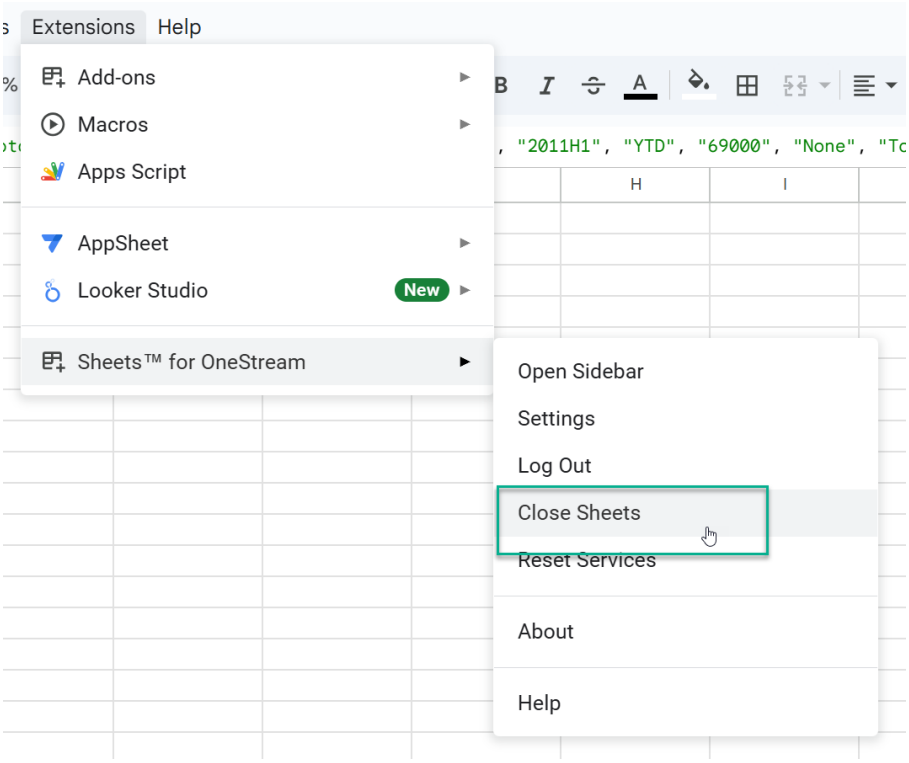


- The Reset Services script will run and fetch the latest updates and changes from your OneStream server and into Sheets™ for OneStream.

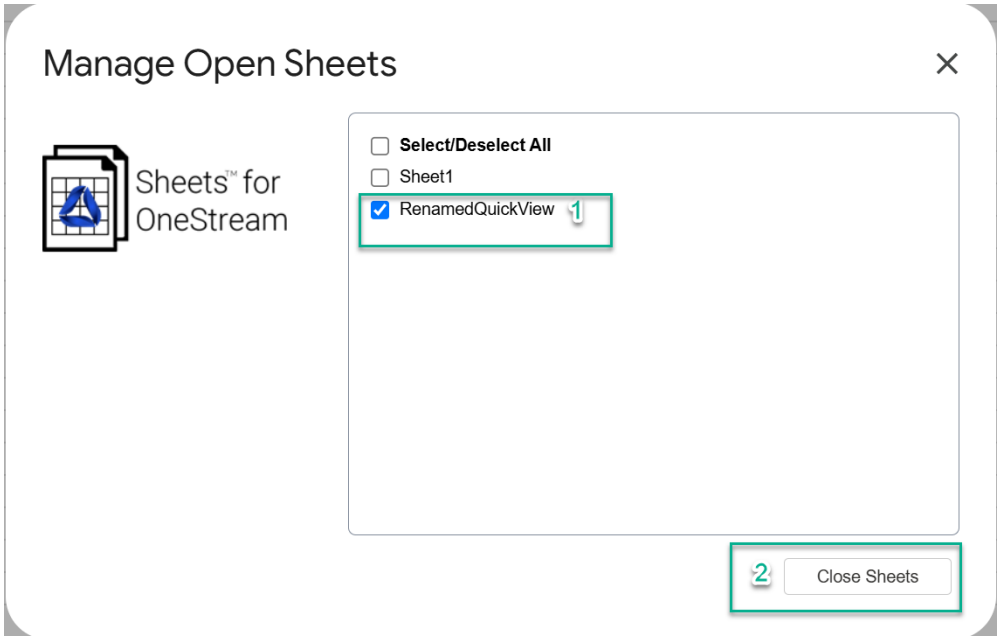
Close Sheets

You can close your open sheets at any point while using Sheets™ for OneStream. To Close Sheets:

- Click on Extensions -> Sheets™ for OneStream -> Close Sheets



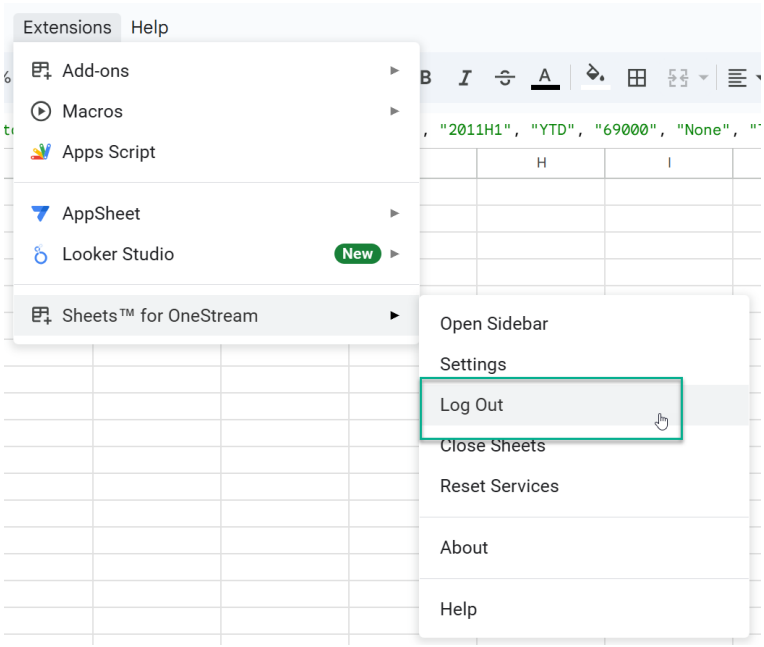
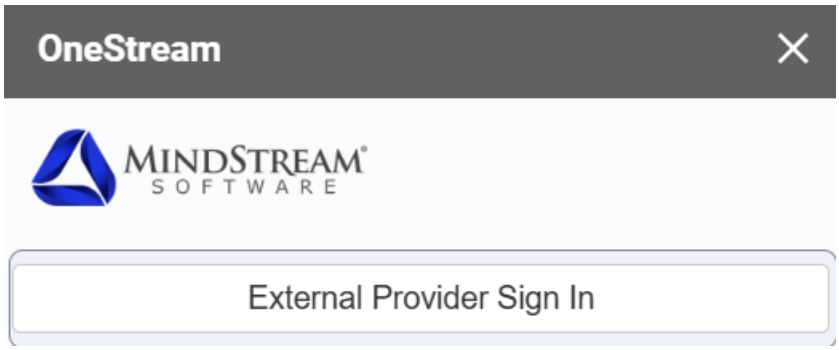
- The Manage Open Sheets window will open and display your currently open sheets in a list
- Click the checkbox to the left of the sheet(s) you wish to close
- Click **"Close Sheets"** button
- The selected sheets will be closed and no longer display at the bottom of the Google Workspace



Log Out

When you are finished with your Sheets™ for OneStream session, use the Log Out function to sign out. To Log Out:

- Click on Extensions -> Sheets™ for OneStream -> Log Out



- The Sheets™ for OneStream sidebar will close and refresh, taking you back to the log in page or external provider sign in