

WITH THE ONESTREAM
EXCEL® ADD-IN

OneStream's Excel® Add-In maximizes ease of use and control for end users who prefer the agility of using spreadsheets across the financial close, planning, reporting and analysis processes. And while organizations often focus on replacing the pervasive use of spreadsheets to support corporate performance management (CPM) processes, OneStream's Excel Add-In and built-in spreadsheet functionality do so on a whole other level. How? By allowing Finance teams to maximize OneStream adoption for end users who have grown to love the comfort and familiarity of Microsoft Excel — but to do so within OneStream's unified Intelligent Platform.

Engage End Users with Platform Flexibility and Agility

Many users are very skilled at working in Excel and have established their own ways of working with Excel features, including formulas, hotkeys, formatting and pivot tables. With OneStream, end users are empowered via leveraging the efficiency of their familiarity with data manipulation and analysis within Excel.

Take Advantage of Expertise and Familiarity with Excel

Data Entry: Using an Excel form that's unified to OneStream, HR users can update the number of new hires to drive changes in budgets for internet and cell phone expenses. These changes can even be calculated within the linked spreadsheet formulas to update the corresponding accounts in OneStream.

Ad-Hoc Reporting and Analysis: An analyst performing variance analysis on a net sales report in Excel might see that sales for one location are higher than expected. Operating completely within the Excel report, the analyst can investigate by drilling down to the product level to identify which product has higher-than-expected sales. To investigate further, the analyst can even drill through to source data and view individual invoices, while remaining in Excel, to get granular detail.



Enable Platform Adoption

Streamline user training and engage OneStream end users who prefer working within Excel. Offering this comfortable and familiar interface encourages high acceptance rates for all users, including those who only occasionally access the OneStream platform.

Empower End Users

Provide **flexible interface options**. Users can complete the financial close, reporting, budgeting, planning, data entry tasks and more — all within the familiar user experience of Excel.

Maintain Transparency and Internal Controls

Provide end users with secure, self-service access to the appropriate data for their roles. All **audit trails, platform security and user-defined access levels** for viewing and updating information within the OneStream platform are preserved when using the Excel Add-In.

Lead at Speed with the OneStream Excel Add-In

OneStream's Excel Add-In enables users to enter and update data, quickly create reports and conduct powerful ad-hoc analysis entirely within the Excel interface users already know.

Through Excel spreadsheets unified with the OneStream platform, data governance and control are preserved as users only have access to view or change data as defined by their respective roles in the platform.

Address the Challenges

The OneStream Excel Add-In empowers end users with the flexibility and agility of Excel while creating key capabilities across financial close, planning and reporting activities:

- **Powerful ad-hoc analysis** of financial and operational data to answer any question in seconds with drag, drop and pivot Excel analytics or to include multiple Cube Views, Quick Views and Retrieves in the same Excel sheet.
- **Drill down by data levels** all the way to transactional information to clarify understanding and answer questions.
- **Access relational data** to view and analyze data sets containing both financial and high-frequency operational data.
- **Use flexible reporting** in OneStream's Excel Add-In to leverage all the native chart and graph capabilities of Excel. Reports created in Excel are dynamic and updated whenever data in OneStream changes.
- **Enjoy easy data entry and updating** with detailed spreadsheets linked to OneStream.
- **Maintain governance and confidence** as all user access levels that can view and update data within OneStream are preserved through the add-in interface.
- **Benefit from short learning curves** for all users, even those who only sometimes interact with the system, e.g., during month-end close or annual budgeting.
- **Enable users** to track consolidation status and apply calculation and consolidations completely within Excel.



DATA ENTRY

View, add and update all data with user-level governance and control within the Excel interface that's familiar to most users.



AD-HOC ANALYSIS

Access OneStream Cube Views and Data Grids across dimensions while leveraging the full analysis capabilities of Excel. Quickly perform ad-hoc analysis on actual data on a recurring basis.



REPORTING

Blend OneStream reports, charts and data with Excel content for report delivery, or build reports entirely within Excel.

“We are creating and automating so many different reports and calculations, such as capitalized variance and weekly profit estimates, and the Excel add-in benefit cannot be understated. Now there's **more time spent on analysis of the business results** versus collection and consolidation of data.”

—Megan Jones | Manager, Financial Planning & Analysis,
ORCHID ORTHOPEDIC SOLUTIONS

