

# OneStream's Latest CPM Platform Release Improves xP&A Support

[This article first appeared on the OneStream blog by Zach McKeown](#)

While many of our customers are busy prepping 2022 budgets, at OneStream, we recently delivered our latest quarterly platform release, boosting your corporate performance management capabilities.

For both new and existing customers, OneStream version 6.6 is a must-have. We've enhanced the ease of use with Task Scheduler, added new Waterfall Charting capabilities, and enriched the Excel Add-in and native Spreadsheet experience. Plus, OneStream 6.6 also includes a powerful new capability called Hybrid Scenarios. Read on to learn more about these capabilities and how they can help organizations plan and report with more speed and flexibility.

## Supporting eXtended Planning & Analysis (xP&A)

OK, let's cut to the chase with the most powerful new feature in OneStream's unified Intelligent Finance Platform. Hybrid Scenarios are part of a broader effort to further improve the OneStream user experience and eXtended Planning & Analysis (xP&A) use cases. How? By providing agile and flexible features to help organizations like yours lead at speed.

A few core realities are driving our newest innovations.

First, corporate performance management (CPM) applications inevitably grow and evolve over time through several different levers but primarily through the addition of more dimensions and additional dimension members. That growing dimensionality leads to higher data volumes and a continued need for scalability and performance for planning and reporting on larger volumes of more detailed data.

Second, as companies optimize and enhance their applications, the natural evolution can drive the need for model changes, such as splitting up cubes to focus on slices of a dimension and data sets. Unfortunately, splitting cubes traditionally comes with extra costs for data movement, data synchronization, and additional overhead management.

Now with OneStream, Hybrid Scenarios allow the application to easily grow with an increased demand for dimensions and any additional growth of members within dimensions, giving users the ability to choose the right capability for your specific needs. (See Figure 1)



Figure 1: Platform Feature Capabilities

If you've ever felt the pressure of tracking down specific data for management reporting, you know the pain of not having it. Or realizing you have it only to find out it takes a painfully long time to gather and format. Sometimes a seemingly simple request can take hours, if not days to fulfill due to

data complexity and volume.

Leveraging Hybrid Scenarios helps end that pain. With this new capability, users can quickly and seamlessly attain the slices of required data for planning or reporting—and do it at speed.

For example, with Hybrid Scenarios, users can quickly “share data” from an existing source scenario for fast, focused reporting and analysis. Users can also “copy data” from a source scenario and seed a new scenario for planning or forecasting.

In other words, whether you’re on the Finance team or a business analyst, you can focus on delivering the data needed to drive informed decisions and improve business performance.

Below is a quick summary of additional features available in OneStream 6.6.0 and the benefits to customers.

### Ease-of-Use Features

**Task Scheduler:** This is a powerful feature of the OneStream platform that enables users to automate the running of data integration and data management processes. In OneStream 6.6 we introduced new settings in the Task Scheduler providing users the ability to set the Minutes (Hourly) schedule with more granularity around the time in which the tasks are executed (See Figure 2). This includes:

- Schedule recurring tasks in minutes during a defined block of time (run window) each day
- Execute tasks in a limited timeframe at a certain time of day/eve to enhance resources control (e.g., run my task every 60 minutes: between 8pm and 11pm)



Figure 2: Minute Task Schedule Control

**Waterfall Chart:** This significant new chart type adds to the already robust Dashboard options currently available. In OneStream 6.6 we introduced Waterfall Chart interactive capabilities with some additional new series settings that enhance data visualization capabilities. (See Figure 3). This includes:

- Intuitive and easier-to-use functionality when assigning colors to the series (e.g., Start Bar Color, Total Bar Color, Rising Bar Color, Falling Bar Color)
- Variance value display for each bar
- Total included in series (i.e., Total Value Label)
- Positive (top of bar)/negative (below the bar) variance label positioning



Figure 3: Waterfall Chart

Excel Add-In/Spreadsheet: Finance users heavily leverage OneStream's Excel Add-in and native Spreadsheet feature for data entry, reporting, and analysis while letting our platform provide control and governance on the back-end. OneStream 6.6 adds the ability to use VBA (Excel Macros) when using large Excel files with multiple tabs to automate the files to set data rather than opening up each file one by one and using the Submit function in the Excel Add-In. The XFGETCELL, and now XFSETCELL, functionality can be surfaced using VBA to run a macro to set and get data via VBA.

- Includes Excel VBA Submit Data function (SubmitSetXFFunctions), a new VBA XFunction that provides the ability for Excel Add-In users to submit data via XFSETCELL via an Excel Macro (or VBA)
- Enhances ability to automate submitting data back to OneStream database when used with XFSETCELL

#### Advanced Design & Analytical Features

BI Viewer Dimension Hierarchy Support. This new feature in the OneStream BI Viewer enables viewing data in an easy-to-understand hierarchical format via dimension leveling. With the BI Viewer, users can design various dashboard items (e.g., grids, pivot tables, charts, etc.) in which to view the dimension-leveled data. (See Figure 4). New features include:

- New "Dimension Level" property in Cube View MD
- Option to create levels sourced from a Cube View
- Columnar format in BI Viewer to build hierarchical presentations
- Visibility into functional hierarchies in BI Viewer
- Ability to drill into lower-level tree items

Imagine your users walking into the office knowing they will no longer be bound to rigid views of hierarchies in your legacy finance reporting tool. Sounds great, doesn't it? This powerful new OneStream feature within BI Viewer specifically addresses the challenges users may have felt in the past. The feature will also enrich the reporting experience through increased flexibility that increases efficiency.



Figure 4: BI Viewer Hierarchy Support

[Learn More](#)

If you're an existing customer looking to learn more, check out the OneStream 6.6 release notes on

the OneStream MarketPlace. Not yet a customer? Sign up for our upcoming [webinar](#) or another upcoming [event](#).

As your FP&A team begins your xP&A journey, download our [whitepaper to learn more](#) about the key factors that are critical for effective xP&A.