

# OneStream® Narrative Reporting

## The Narrative Reporting Challenge

Narrative Reporting is traditionally a time-consuming, manual, complex, and inefficient process to collect comments, assemble data and reports, and create narratives for reporting. With the current solutions and approaches that encompass multiple tools, you face a host of challenges: duplicated data and metadata, cut-and-paste reports, data and comments, and narratives created in multiple documents and spreadsheets.

This approach creates complexity in the assembly, review and approval of narratives, and narrative reports across many tools and manual processes. Ultimately, traditional approaches fall outside your consolidation and planning systems, fueling a lack of trust in the reports, data, and narratives used for financial and management reporting.

## Value Proposition

Centralize and automate the narrative assembly, analysis, review, and reporting processes in OneStream — rather than rekey and cut/paste — to simplify and ensure context, confidence, and auditability across the Narrative Reporting process.

## Capabilities & Benefits

- **Centralized & Streamlined Assembly of Narrative Books:** Centralize the creation of Narrative Books uniquely unified in one solution using OneStream — effectively organizing report content, live analysis and collaborative narrative capture to streamline analysis and communicate corporate performance.
- **Live Narrative Reporting:** Analyze and search live, validated OneStream data/reporting content while capturing narratives — streamlining the contextual analysis, review, and Narrative capture process.
- **Reduce Risk & Reporting Errors:** Leverage the same interface, workflows, validations, and controls to get trusted, auditable results — eliminating the risk and costs of traditional solutions that require copying, pasting, and duplicating.
- **Accelerate the Narrative Reporting Process:** Leverage all existing OneStream reporting artifacts, import reporting content as needed to quickly structure Narrative Books, copy from prior periods, and embed in the close, planning, and other workflow processes with approvals — saving time, driving efficiency, and accelerating the Narrative Reporting process.

### KEY BENEFITS

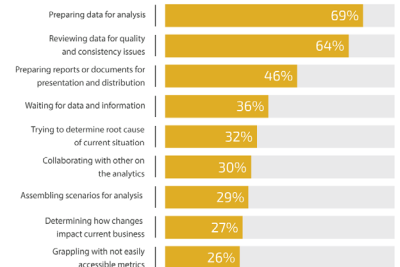
- Centralized Creation of Books
- Live Analysis of Report Content
- Confidence in Data & Narratives
- Trusted, Familiar Interfaces
- Elimination of Risk & Reporting Errors

### DID YOU KNOW

69% of financial analysts' time is spent on preparing data for analysis — not on analysis, narratives, and reporting.

#### Majority of Time Spent Analyzing Data

64% cite reviewing data for quality and consistency



Source: Ventana Research  
Analytics and Data Benchmark Research  
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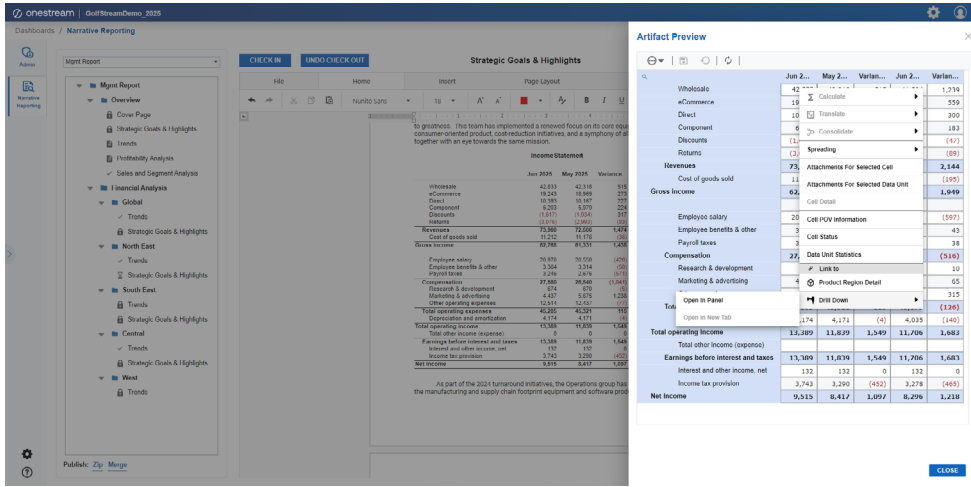
Leverage the same OneStream interface and trusted reporting content alongside the familiarity of MS Office to capture narratives, and create rich, formatted, and collaborative Narrative Books.

The screenshot displays the OneStream Narrative Reporting interface. On the left, a navigation pane shows a tree view of report sections: 'Mgmt Report', 'Overview', 'Cover Page', 'Strategic Goals & Highlights', 'Trends', 'Profitability Analysis', 'Sales and Segment Analysis', 'Financial Analysis', 'Global', 'North East', 'South East', 'Central', and 'West'. The main content area is titled 'Strategic Goals & Highlights' and contains a table of contents, a text area with the heading 'STRATEGIC GOALS AND LONG-TERM VISION', and a waterfall chart labeled 'WATERFALL CHART' showing revenue changes from 75,000 to 81,000. The interface includes a top navigation bar with 'CHECK IN' and 'CHECK OUT' buttons, and a right-hand 'Activity Log' panel showing a list of user actions and timestamps.

# OneStream® Narrative Reporting

## Live Narrative Reporting

Stop relying on static data, charts, graphs, exhibits and reports. You can be confident that your numbers are correct because all content is directly accessing the trusted content in OneStream. All content is live, so you can analyze, drill down, and drill back in line with your narrative capture — ensuring rich narrative analysis and reduced risk in reporting.

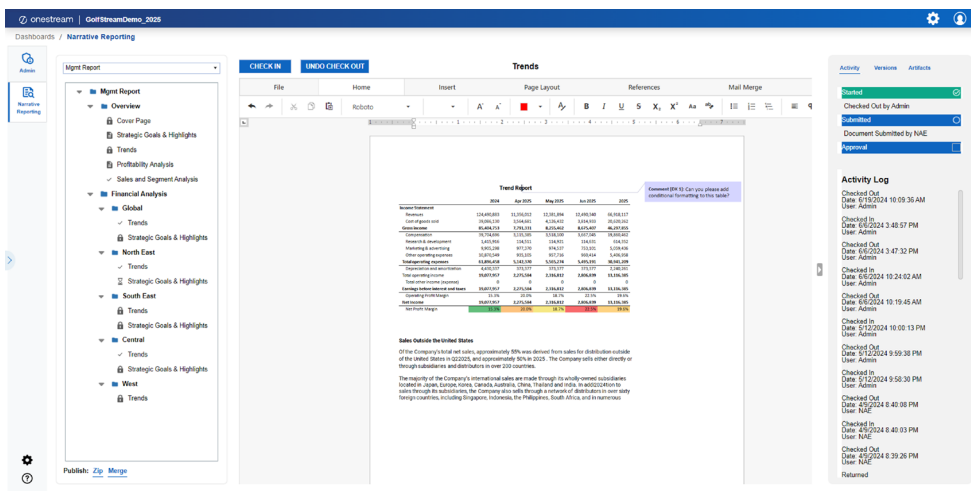


### KEY CAPABILITIES

- Centralized, streamlined assembly of Narrative Books
- Live analysis of report content to capture informed narratives
- Ability to leverage all existing OneStream reporting artifacts to accelerate the Narrative Reporting process
- Elimination of risk, reporting errors, and costs of using multiple tools and solutions to copy, paste, and duplicate
- Built-in collaboration, comments, and track changes
- Fast, easy creation of Narrative Books by copying from prior periods or existing narrative documents to jumpstart the Narrative Reporting process
- Trusted, familiar OneStream and MS Office Interfaces that give you confidence in the data and narratives

## Collaboration, Status, Versioning, Audit, and Trust

Leveraging the trusted, familiar interface of either OneStream or MS Office, preparers and approvers can collaborate on content, leave comments, track changes, and review a full history of changes over the document lifecycle. The interface also includes status and approvals — delivering trust and confidence in the Narrative Reporting process.



### CUSTOMER SUCCESS:

#### Large Governmental Agency

This agency previously used six different tools to build their 1,400 page budget to submit for annual budget appropriation. With OneStream, they now use only OneStream to create all their budget books including budget briefs, justifications, and final budgets.

#### The Benefits:

- Centralized into one solution from six, streamlining the budget and narrative process
- Standardized and automated the process with master templates and exhibits
- Shortened budget changes and narrative capture process from days to minutes