

BEYOND THE CONNECTOR:

Enterprise OneStream Analytics in Power BI and Copilot

Tuesday, October 20, 2026

Ryan Connors, Group Product Director, OneStream

Marla Nelson, Chief Technology Officer, QuickLaunch Analytics

David Kettinger, Marketing Director, QuickLaunch Analytics





01

Ask questions anytime

Use the Q&A box. We'll answer as many as we can at the end.

02

Everyone gets the recording

Plus the Top 8 OneStream Analytics Challenges eBook, sent to everyone registered.

03

About 60 minutes

Live demos at every step, then open Q&A with Ryan and Marla.



Why **OneStream** and
QuickLaunch Analytics



Live demo:
semantic model,
drill-through and AI



The connector:
what it does and what's coming



Key takeaways
and what happens next



Five steps:
**from cube to governed
semantic model**



Q&A



Meet QuickLaunch Analytics



Our Purpose

We simplify and accelerate the complex world of data analytics.



Data Analytics



Our Mission

Deliver a comprehensive platform that centralizes and transforms your data ecosystem into a **unified enterprise-wide foundation for trusted information**, accelerating time to insights and driving business outcomes that previously weren't possible.



Core Strengths

- 25 years of experience in enterprise analytics
- Deep expertise in ERP, Databricks, Power BI, and modern data architectures
- 81 NPS score reflecting genuine partnership





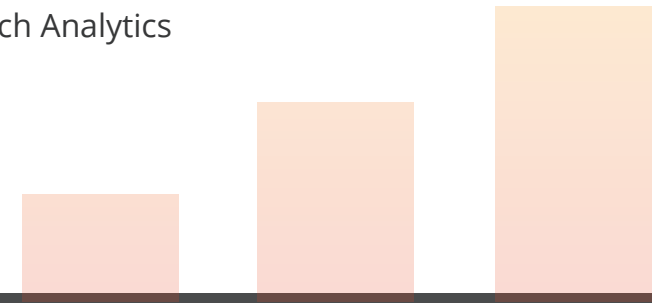
Ryan Connors
Group Product Director
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Marla Nelson
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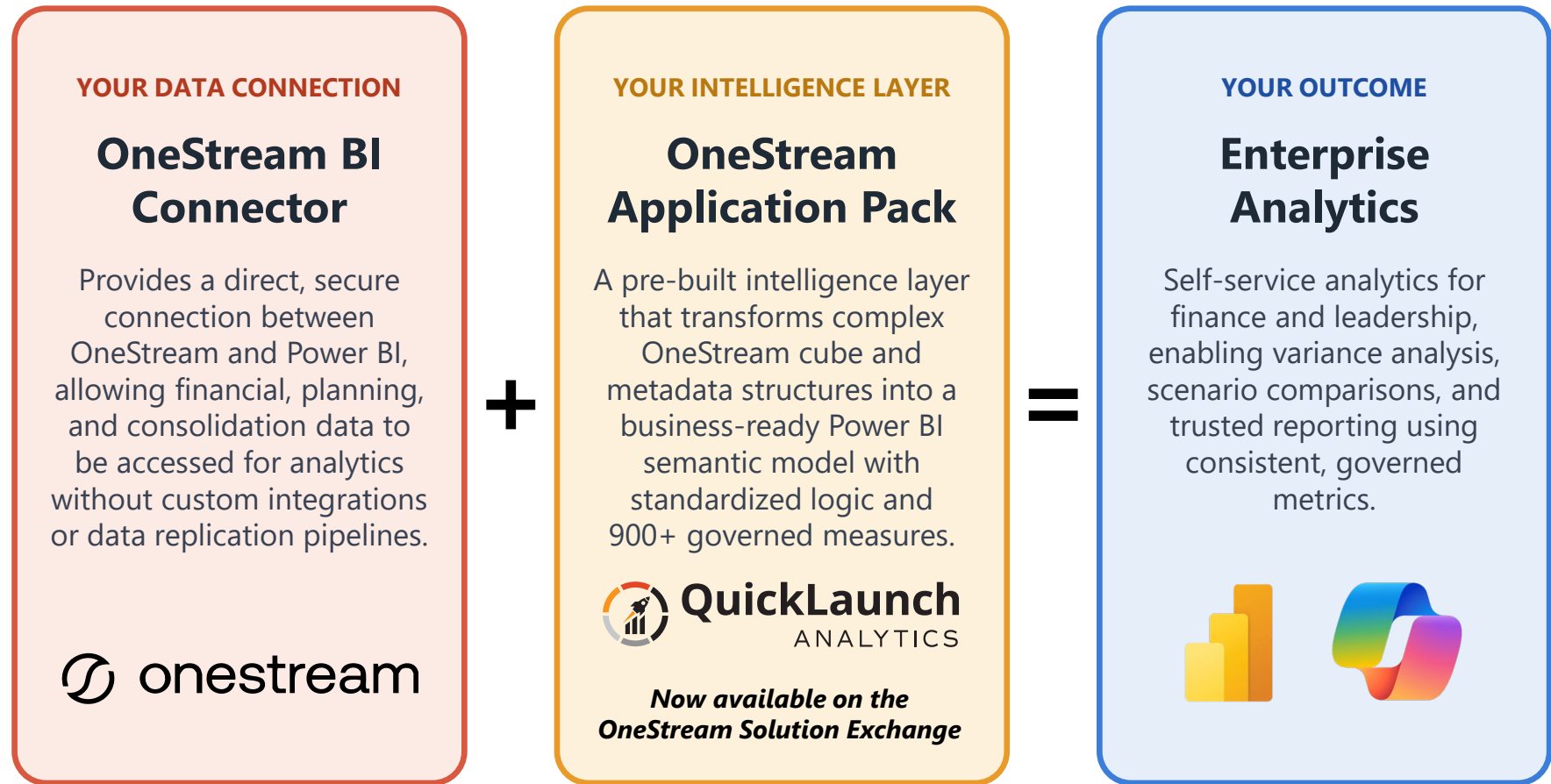


David Kettinger
Marketing Director
QuickLaunch Analytics





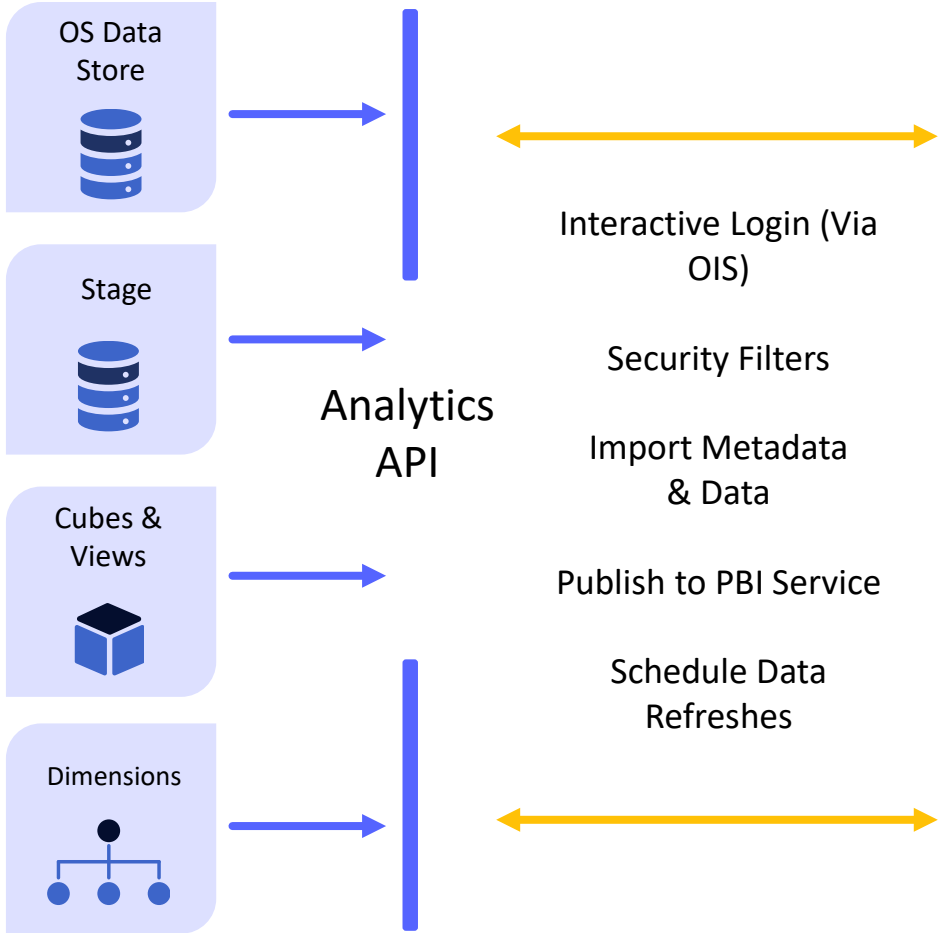
Why OneStream and QuickLaunch Analytics



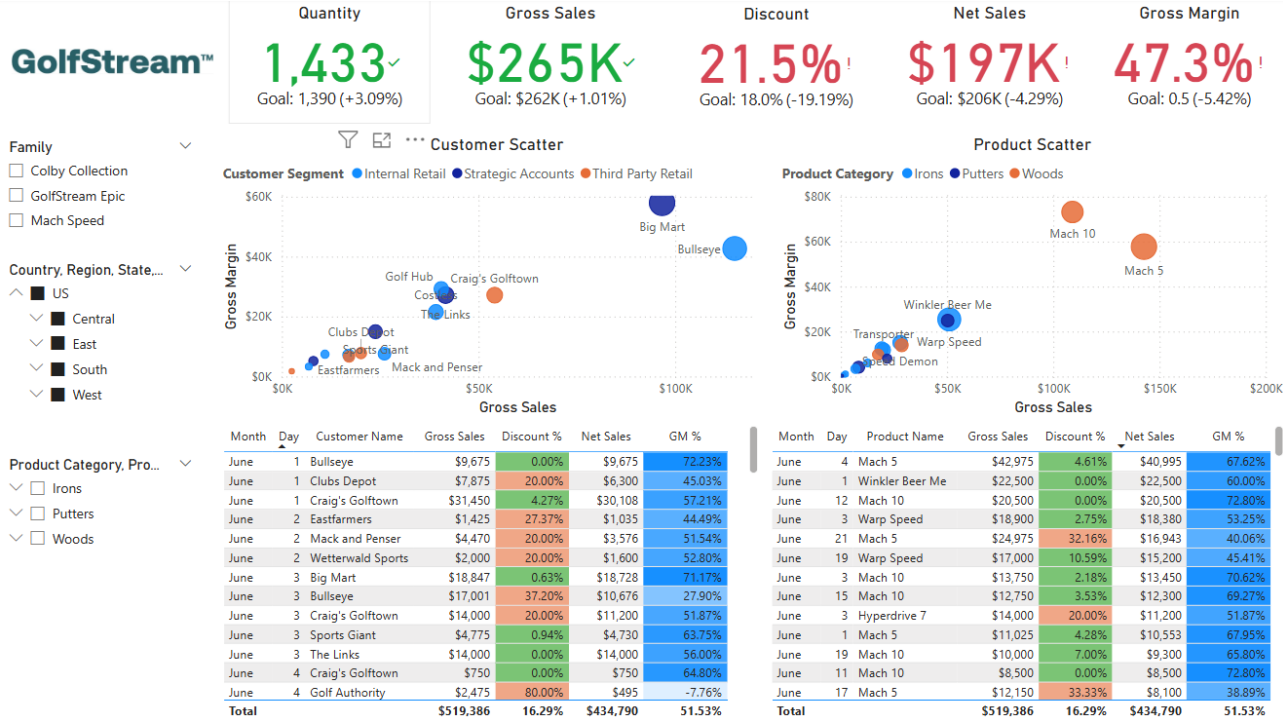
(Requires OneStream BI Connector license)

Delivering Trusted Insights with Power BI

Unlock full potential of OneStream data with Microsoft-Certified Connector



Power BI Desktop



GET MEMBER
PROPERTIES

Get Custom Data Adapter

Retrieves data Workspace Data Adapter. This could be a cube view, cube view MD, staging data, register, SQL, business rules or methods.

Navigator

Display Options

☐ Get Cube Data

☐ Get Custom Adapter Data

☐ Get Dimension

☐ Get Member Properties

BAI

BAI Cube

CapEx

CapExDriver

CashFlow

CashForecast

CFDrivers

CFModel

Drivers

GolfStream

Houston [4]

☐ Get Cube Data

☒ Get Custom Adapter Data

☐ Get Dimension

☐ Get Member Properties

MulticurrencyConsolidation

MulticurrencyCube

NewYork

Ottawa

Profitability

ProfitabilityDrivers

World

XPRDataSources [4]

☐ Get Cube Data

☐ Get Custom Adapter Data

☐ Get Dimension

☐ Get Member Properties

SS_GolfStream_v01

WPX - Splash Event

Adapter Name

Sales Mix (WF)

Workspace Name

Default

Result Data Table Name (optional)

Example: e.g. Table

Custom Subst Vars As Comma Separated Pairs (optional)

Example: e.g. param_cur,

Apply

Clear

Get Custom Adapter Data

RowId	RowName	PovCubeNameAndDesc	Pov01EntityNameAndDesc	Pov02ScenarioNameAndDesc	Pov03TimeNameAndDesc	Pov04ViewNameAndDesc	RowHdr0NameAndDesc	RowHdr0Indent	Cu01Hdr0NameAndDesc
0 Row1	GolfStream - Corporate	Total GolfStream			YTD		Drivers		0 60000 - Operating Sales
1 Row1	GolfStream - Corporate	Total GolfStream			YTD		Fairway Woods		0 60000 - Operating Sales
2 Row1	GolfStream - Corporate	Total GolfStream			YTD		Hybrids		0 60000 - Operating Sales
3 Row1	GolfStream - Corporate	Total GolfStream			YTD		Iron Sets		0 60000 - Operating Sales
4 Row1	GolfStream - Corporate	Total GolfStream			YTD		Wedges		0 60000 - Operating Sales
5 Row1	GolfStream - Corporate	Total GolfStream			YTD		Putters		0 60000 - Operating Sales
6 Row1	GolfStream - Corporate	Total GolfStream			YTD		Balls		0 60000 - Operating Sales
7 Row1	GolfStream - Corporate	Total GolfStream			YTD		Apparel		0 60000 - Operating Sales
8 Row1	GolfStream - Corporate	Total GolfStream			YTD		Accessories		0 60000 - Operating Sales
9 Row1	GolfStream - Corporate	Total GolfStream			YTD		Electronics		0 60000 - Operating Sales

Load Transform Data Cancel

onestream

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8

GET CUSTOM DATA ADAPTER

GET DIMENSIONS

GET CUBE DATA

Get Cube Data

Retrieves a set of data cells from a cube.
Data unit members are mandatory while other dimension members are optional (default to “None”).
Added also a “**Start date**” and “**End date**” column based on the Time value (e.g., 2023M1 is 01/01/23 and 31/01/23).

Navigator

Display Options

☐ fX Get Cube Data

☐ fX Get Custom Adapter Data

☐ fX Get Dimension

☐ fX Get Member Properties

☒ Houston [4]

☐ fX Get Cube Data

☐ fX Get Custom Adapter Data

☐ fX Get Dimension

☐ fX Get Member Properties

☐ MultiCurrencyConsolidation

☐ MultiCurrencyCube

☐ NewYork

☐ Ottawa

☐ Profitability

☐ ProfitabilityDrivers

☐ World

☒ XFR_DataSources [4]

☐ fX Get Cube Data

☐ fX Get Custom Adapter Data

☐ fX Get Dimension

☐ fX Get Member Properties

☐ SS_GolfStream_v01

☐ WPX - Splash Event

Entity

Houston

View

YTD

Currency/Consolidation

Local

Account

50300.Base

Flow

Apply

Clear

Get Cube Data

Entity	Consolidation	Scenario	Time	Time_StartDate	Time_EndDate	View	Account	Flow	Origin	IC	UD1	UD2	UD3	UD4	UD5
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50000	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50120	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50130	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50010	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50140	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50020	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50100	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50110	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50200	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50210	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50220	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50230	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50250	None	Top	Top	Top	Top	Top	Top	None
Houston	USD	BudgetV1	2011M3	3/1/2011 12:00:00 AM	3/31/2011 12:00:00 AM	YTD	50260	None	Top	Top	Top	Top	Top	Top	None

Load

Transform Data

Cancel



GET CUBE DATA



GET MEMBER PROPERTIES

GET DIMENSIONS

Get Dimensions

Retrieves a levelled dimension, ready to use in Power BI for creating relationships with cube data and then creating reports

Navigator

Display Options

☐ *fx* Get Cube Data

☐ *fx* Get Custom Adapter Data

☐ *fx* Get Dimension

☐ *fx* Get Member Properties

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SS_GolfStream_v01

WPX - Splash Event

Dimension Type

Entity

Include Descriptions

True

Scenario Type

Actual

Apply

Clear

Get Dimension

Entity_L1	Entity_L1_Desc	Entity_L2	Entity_L2_Desc	Entity_L3	Entity_L3_Desc
None	None	None	None	Root	Root
North Houston East	North Houston East	Houston	Houston	Root	Root
South West Houston	South West Houston	Houston	Houston	Root	Root
South East Houston	South East Houston	Houston	Houston	Root	Root
Houston Heights	Houston Heights	Houston	Houston	Root	Root
South Houston	South Houston	Houston	Houston	Root	Root

Load Transform Data Cancel

GET DIMENSIONS



GET MEMBER PROPERTIES

GET CUSTOM DATA ADAPTER

Get Member Properties

Retrieves all members of a dimension with related properties such as text fields used for reporting.

The screenshot shows the Onestream software interface. On the left is the 'Navigator' pane with a tree view of dimensions. The 'Get Member Properties' option is selected under the 'Housten [4]' dimension. On the right is the 'Get Member Properties' table, which displays a list of members with their properties.

PropertyScenarioType	PropertyTime	MemberName	MemberDescription	Currency	AutoTranslationCurrencies	Text1	Text2	Text3	Text4	Text5	Text6	Text7	Text8
Actual	Default	Houston	Houston	USD		NA	Mtg						
Actual	Default	North Houston East	North Houston East	USD		PP							
Actual	2025M1	North Houston East	North Houston East	USD		WW							
Actual	2025M2	North Houston East	North Houston East	USD		PostAq							
Actual	Default	South West Houston	South West Houston	USD		PostAq2							
Actual	Default	South East Houston	South East Houston	USD		NA	Mtg						
Actual	Default	Houston Heights	Houston Heights	USD		NA	Mtg						
Actual	Default	South Houston	South Houston	USD									

TIPS FROM THE FIELD

Security: easy in Desktop, deliberate in Service

OneStream security flows automatically from Power BI Desktop. Carrying it through to Power BI Service takes one extra step — but it's worth it.

01

Desktop: security is automatic

When pulling from Power BI Desktop, the OneStream security model is honored end-to-end. No extra setup required.

03

Bridge the gap with a method query

Use a data adapter pull type of method query and call the appropriate OneStream method query to load user / entity security context into a Power BI table.

02

Service: security follows the publisher

Once a report is published to Power BI Service, security shifts to whatever the publisher configures — OneStream security no longer follows the data by default.

04

Point Service reports at the security table

When publishing, point the report at that security table to control access — this carries OneStream security through to Power BI Service.



Security

TIPS FROM THE FIELD

Volume: 2M records per pull — and how to scale past it

The Power BI Connector caps each pull at 2 million records. The fix: split by data unit in OneStream and append in Power BI Desktop.

01

Know the 2M-record limit

The Power BI Connector returns up to 2 million records per pull. Larger datasets need to be split before extraction.

02

Break up by data unit

Best practice is to break up the data by the data unit in OneStream — typically Entity or Time. Smaller, repeated calls beat one giant request.

03

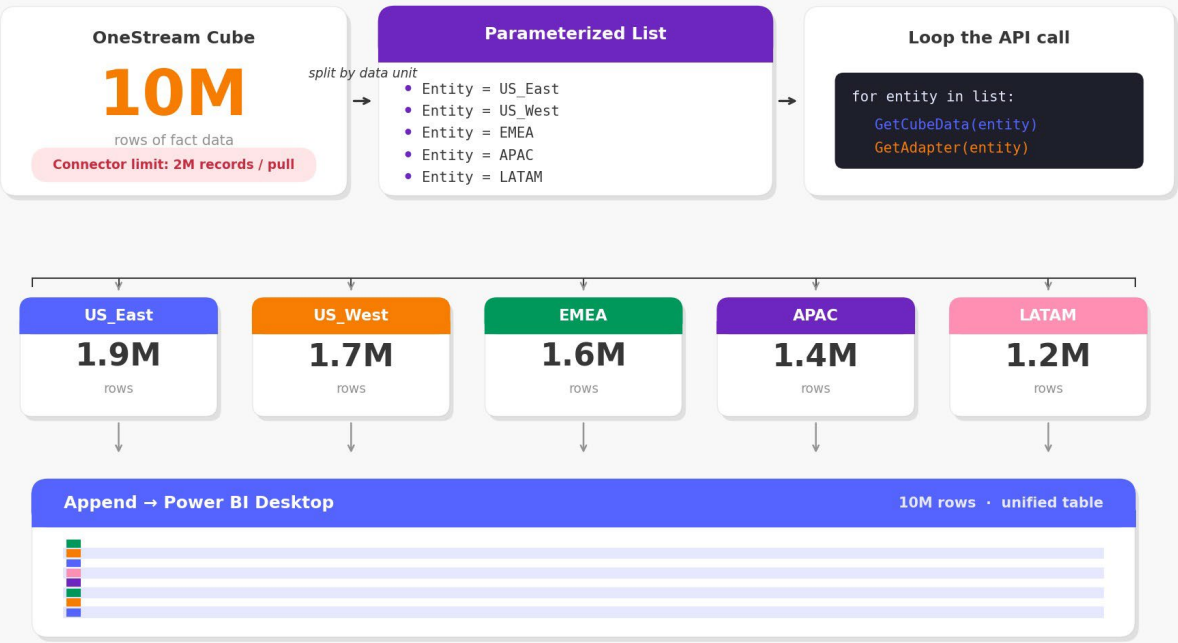
Loop with a parameterized list

Create a parameterized list of entities or time periods and call GetCubeData or GetAdapter multiple times, looping over the list to pull each chunk.

04

Append back in Power BI Desktop

Once all chunks are loaded, use the Append feature in Power BI Desktop to bring them back into a single table — clean and refresh-friendly.



Volume

COMING IN 2027 H1

What's next for the Power BI Connector

Three enhancements to help you move large data sets into Power BI faster and with more control.

01

Partitioning within the API

The API handles partitioning of large data sets, reducing the manual splitting needed today.

02

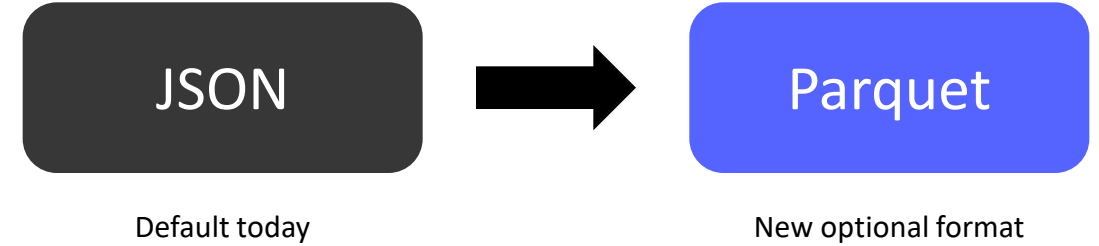
Parquet data transfer

An optional Parquet format moves large data sets into Power BI noticeably faster. JSON stays the default and existing reports keep working.

03

Flexible member properties

Exploring the option to choose which member properties to include, so each extract fits your use case.

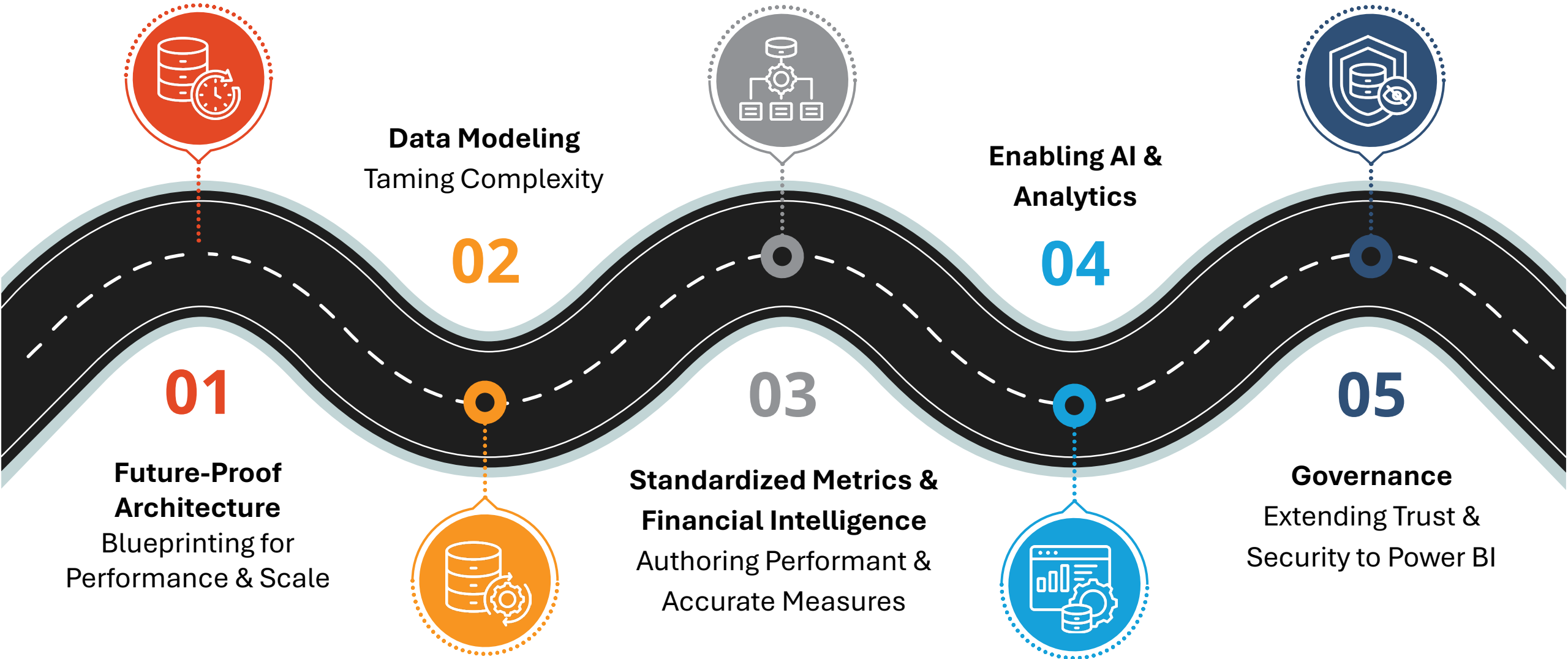


Faster transfer for large data sets

What's next



The 5-Step Playbook for Enterprise-grade OneStream Analytics





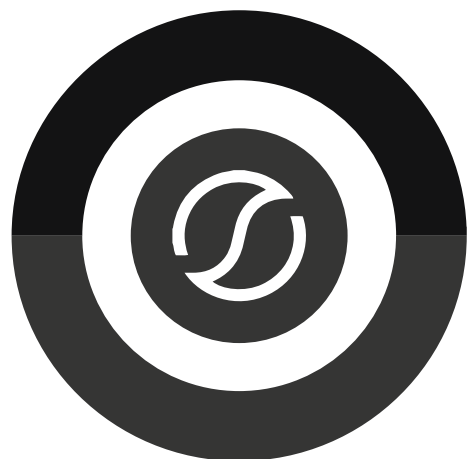
Step 1: Future-Proof Architecture

From the Connector to a Governed Semantic Model

 onestream

 QuickLaunch
ANALYTICS

 Power BI



OneStream
Connector



Connect

Model

Analyze

OneStream Configuration

- Power BI Connector
- Workspace and Data Adapters
- Data Management Jobs
- Dimension Mapping Table

Governed Semantic Model

- Data security
- ~25 Relationships
- 550+ Dimension Fields
- ~900 Measures & KPI's
- Metrics Governance
- Hierarchies & Alternate Hierarchies
- Partition Design

Business-Ready Reporting

- Power BI Dashboards & Reports
- Income Statements & Balance Sheets
- Excel Templates



Step 2: Data Modeling

Taming Complexity with Star Schema Design

Calendar Dimension

Fiscal and standard calendar support
Time intelligence prerequisites
4-4-5 calendar handling



Relationships

One-to-many from dimensions to fact
Proper cardinality and filter direction

Time Series Analysis

Central Fact Table (measures, actuals)
Dimension Tables (Entity, Account,
Scenario, Period)

Hierarchies & Sort Orders

Financial statement hierarchy
Alternate hierarchies for flexibility
Proper sort order matching OneStream

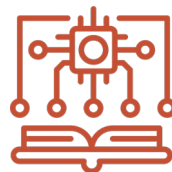


Step 3: Standardized Metrics & Financial Intelligence

Authoring Performant & Accurate Measures

Centralized Measure Library

900+ pre-built calculations
Standardized across enterprise
Version controlled



Financial Intelligence



Scenario Analysis

Actual vs. Budget vs. Forecast
Variance calculations
Side-by-side comparisons

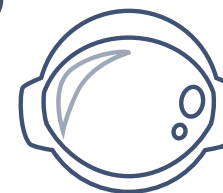
Financial Intelligence Rules

Account type handling (Asset, Liability, Revenue, Expense)
Signs that flip by account type
Proper aggregation by account type



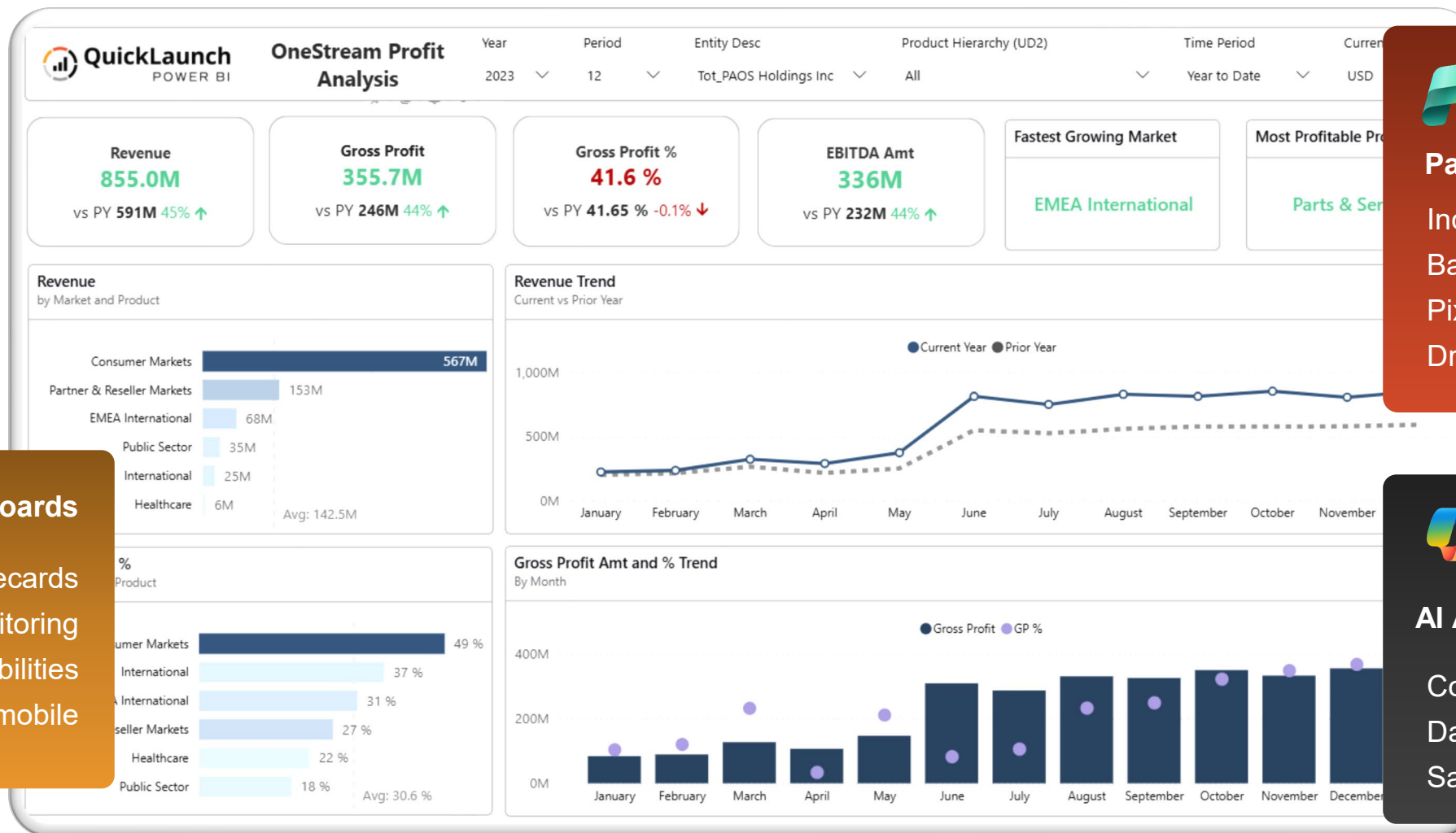
DAX Best Practices

Performant calculation patterns
Avoiding row context iteration
Using variables effectively





Step 4: Enabling AI and Analytics



Interactive Dashboards

Executive scorecards
KPI monitoring
Drill-through capabilities
Built for mobile



Paginated Reports

Income Statement
Balance Sheet
Pixel-perfect formatting
Drill-to-detail



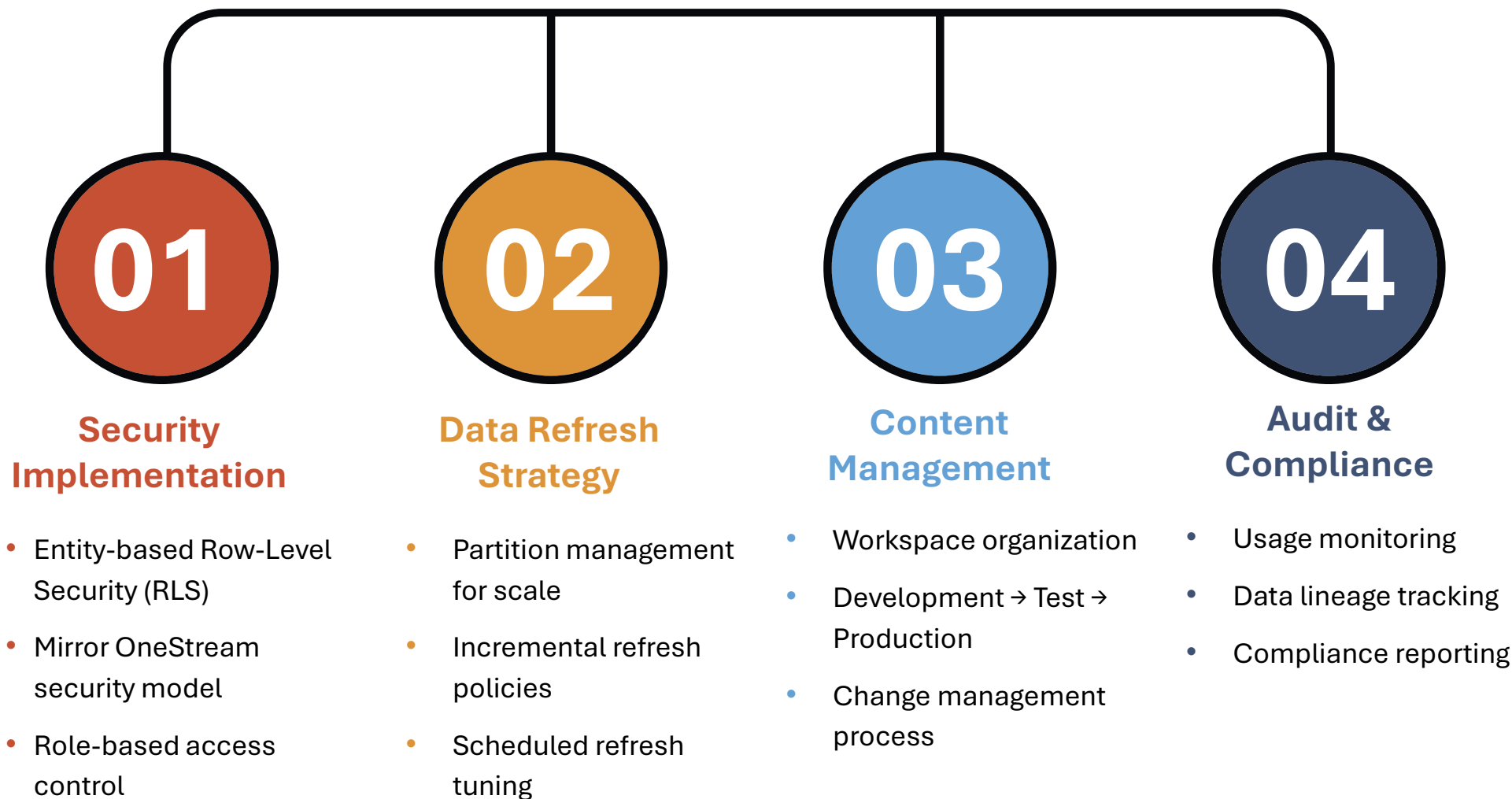
AI Analytics

Copilot
Data agents and apps
Same semantic model



Step 5: Governance and Scale

Extending Trust & Security to Power BI



Demo

- The semantic model
- Drill to the transaction
- Ask your data





The connector is step one.

It gets OneStream data into Power BI. The five steps after it make that data something Finance signs off on.



Define it once.

Hierarchies, account logic and calculations defined once in a governed semantic model, so every report works from one set of numbers.



Security goes with the data.

Entity-based security that mirrors OneStream, so people see in Power BI what they see in OneStream.

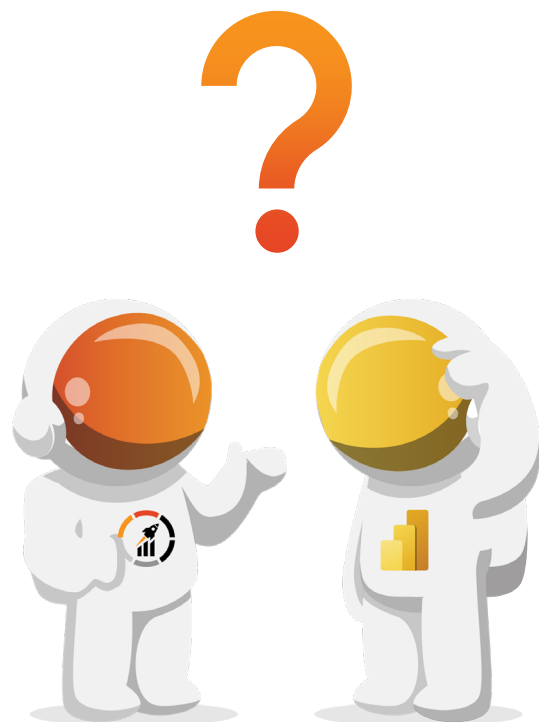


AI starts with the semantic model.

AI is how your people will use your data. The semantic model is why they can trust it.



Questions and Next Steps

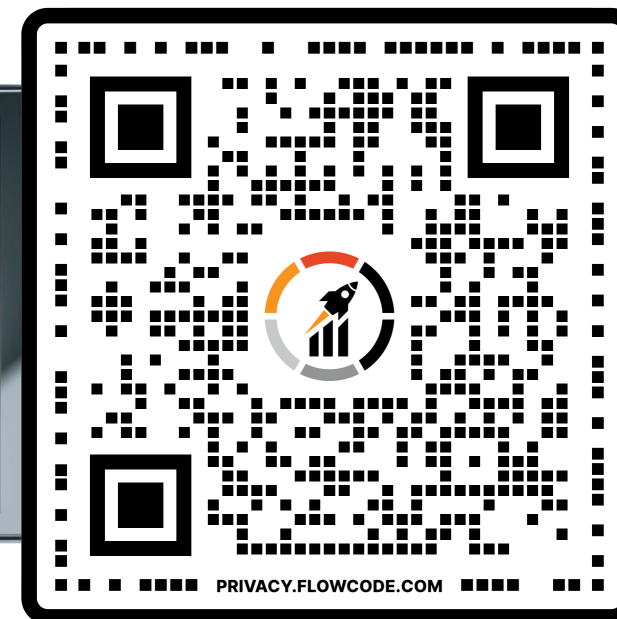


Contact Info

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Download the OneStream Analytics eBook



This guide identifies the 8 most critical challenges organizations face when building a OneStream analytics solution in Power BI and provides actionable solutions for each.

Also available under Resources tab