



# ONESTREAM

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## CLASSROOM

## Level 2 Specialty Planning

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### Course Description

This two-day hands-on course covers the main aspects of the Specialty Planning Solutions with a focus on Thing Planning. This class demonstrates how to incorporate 'specialty' data sets within an application that go beyond the traditional Financial Cube. Attendees will configure this solution to perform calculations and data analysis through a Budget Scenario and guided Workflow.

### Who Should Attend

Only seasoned administrators and OneStream implementers.

### Prerequisites and Advanced Preparation

This is an advanced course. Students must have attended Application Build for Administrators or Application Build for Consultants. In addition to the course prerequisites above, all attendees must be familiar with the financial model including OneStream Dimensionality and Cubes. All attendees must be very comfortable with concepts such as Workflow, Member Formulas, Finance Business Rules, Cube Views and Dashboards. The basic concepts of these features are covered in the Application Build course and will not be covered in this class.

### Registration

Training registration and payment are completed through our online registration system via the OneStream University website: [www.onestreamsoftware.com/services/training](http://www.onestreamsoftware.com/services/training). Payments can be made by credit card or wire transfer. Once registration is complete, you will receive a training confirmation and a receipt.

Complaints should be directed to [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) or OneStream Support Portal at +1 (844) 663-3474.

### Class Size

Public classes require a minimum of three students registered within seven days of the class start or they may be canceled at OneStream's discretion. Once the registered class size reaches its limit (*differs by location*), it will be closed to additional students.

## Agenda

### Day 1

- Introduction to the Specialty Planning Solutions
  - Overview of the Solutions
  - Relational Blending Engine and Specialty Planning
  - High Level Data Flow
- Thing Planning Introduction and Requirements
- Application Setup and Configuration
  - Cube
  - Scenario Dimension
  - Workflow Profile
- Thing Planning Setup
  - Global Options
  - Activity Types
  - Accounts
  - Register Configuration
  - Status
  - Control Lists

### Day 2

- TLP Plan Drivers
  - Global Drivers
  - TLP Regional Drivers (cube based)
- TLP Calculation Definitions Page
  - Allocation Methods
  - Calculation Plans
  - Execution Lists
- TLP Calculation Plan
  - Calculating the plan
  - Making iterative changes to the plan
- TLP Plan Analysis
  - Plan Tasks, Impact, Report
  - Plan Variance Reports, Listing Reports
- TLP Results Import to Financial Model
- TLP Administrations
  - Upgrade considerations/impacts
  - Audit features

### Student Cancellation

Please refer to the cancellation schedule listed below. If you cannot attend a training class, you are permitted to send another employee from your company at no additional charge or choose to have a credit made to your account to use toward a future class.

**All cancellations, substitutions and modifications are completed via our online registration system.**

### Cancellation Schedule

#### 14 or More Days

No charge; full refund

#### 13 to 7 Days

50% of fees charged

#### Under 7 Days

Full fees charged; no refund



### Continuing Professional Education Credits

OneStream Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website at: [www.learningmarket.org](http://www.learningmarket.org).

16 CPE Credits are available for attending this course in the areas of Information Technology and Finance. Contact [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) if you have interest. The program level of this course is Advanced.