



Application Build for Consultants

Course Description

This is a 5-day, hands-on course where the overall goal is to develop the necessary OneStream skill set to implement a OneStream XF project. This is achieved by discussing design theory and best practices as well as building an application based on customer requirements. While this class covers all areas of OneStream XF, both Dimensionality and Cube design are discussed at length as these are the foundation of the OneStream platform and are what prepare the system for multiple data collections.

This class incorporates two project phases. It covers the necessary design considerations and methods when implementing phase one while maintaining the flexibility the system provides for phase two.

Who Should Attend

The attendees for this class are limited to OneStream Implementation Partners and the OneStream Services Team.

Registration

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

Upon training registration and payment, qualified OneStream Partners* will be given access to OneStream Academy which is our online training video library (*some Partners may already have Academy access*). Academy access will be available within three business days from the time of registration and login information will be emailed to the attendee via our Okta Administrator.

*A qualified OneStream Partner must meet all of the following:

- Company is a current OneStream Partner which is defined by a mutually signed OneStream Partner Agreement
Academy access will not be given until the contract is finalized and signed by both parties.
- Currently employed at a OneStream Partner and has a valid company email address
If a valid email address is not provided at the time of registration, Academy access will not be given until the first date of employment.

Complaints should be directed to training@onestreamsoftware.com or OneStream Support Portal at 844-663-3474.

Prior to Attending Training

We recommend viewing the Application Basics course located in OneStream Academy. This is a four-hour virtual overview introducing key OneStream concepts and providing background knowledge about OneStream XF.

Note: Only qualified Partners will be given Academy access. Please see *Registration* on Page 1 for more details.

Agenda

Day 1

- OneStream Product Overview and Demonstration
- OneStream Navigation
- Dimensionality
- Extensibility
- Cubes

Day 2

- Application Properties and FX Rates
- Implementation Requirements
- Design Framework
- Application Design and Build
 - Dimensions and the Metadata Builder

Day 3

- Cube Design and Considerations
- Cube Requirements and Build
- Workflow Structure
- Data Sources
- Transformation Rules
- Data Tie Out
- Forms

Day 4

- Journals
- Data Validations and Quality
- Workflow Design and Tools
- Consolidation
- Intercompany

Day 5

- Security Design
- Reporting
 - Cube Views
 - Spreadsheet
 - Dashboards

CPE Credits

40 CPE Credits are available for attending this course in the areas of Accounting and Computer Science. Contact training@onestreamsoftware.com if you have interest. OneStream LLC 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 the final authority on the acceptance of individual courses for CPE credit.

Class Size

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

Student Cancellation

Please refer to the cancellation schedule below. If you cannot attend a training class, you are permitted to send another employee from your company at no additional charge. If you need to do this, please adjust the name online in the registration system.

14 or More Days

No charge; full refund

13 to 7 Days

50% of fees charged

Under 7 Days

Full fees charged; no refund