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.

Prerequisites

All Application Build attendees must view 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. Email academy@onestreamsoftware.com to request access to OneStream Academy. Please note only current OneStream partners will be given access to OneStream Academy.

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.

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

Agenda

Day 1
- OneStream Product Overview and Demonstration
- OneStream Navigation
- Dimensionality
- Extensibility
- Cube Design and Considerations

Day 2
- Project Methodologies
- Implementation Requirements: Phase 1 and 2
- Design Framework
- Application Design and Build: Phase 1 and 2
  - Dimensions and the Metadata Builder
  - Cube Design

Day 3
- Workflow
  - Workflow Design
  - Workflow Build
  - Workflow Validations
- Data Collection
  - Data Sources
  - Transformation Rules
  - Forms
  - Journals
  - Data Tie Out

Day 4
- Reporting
  - Cube Views
  - Dashboards
  - Spreadsheet/Excel Add-In
- Security
  - Design and Security Builder
  - Build
- Performance
  - Best Practices and Considerations
  - Diagnostics 123

Day 5
- Phase 2 Requirements and Implementation

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