Application Build for Administrators

Course Description

This 4-day, live hands on course involves building out a simple application starting from scratch. The goal of the course is to create a foundation of knowledge about most of the OneStream XF features. This is achieved using simple examples that cover a few iterations of the build process.

First, a very simple application is created, data is loaded, and then consolidated. A second round includes discussions on design practices, additional data input methods, intercompany elimination, and the most common formulas. Once built, a new Entity is added and all application changes are made including data integration, Workflow assignments, and security discussions. Cube Views, charts and Dashboards are added and Excel analysis is explored. Finally, administrative functions are covered.

Who Should Attend

The attendees for this class are limited to OneStream Customer Administrators and OneStream Employees.

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 administrators will be given access to OneStream Academy.

Once your project is under way, we recommend waiting approximately three to four weeks before sending your administrators and only those who will participate in the application build to our Application Build for Administrators course. This will ensure they receive the right skills at the right time to keep your project moving without a long gap between learning and doing.

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 Software Overview
- Deployment and Upgrades
- OneStream Navigation
- Dimensions and Members
- Cubes
- Introduction to Workflow Structures
- Point of View and Application Properties

Day 2
- Introduction to Data Sources
- Introduction to Transformation Rules
- Form Templates
- Journal Templates
- OneStream Calculations and Calculated Members
- Foreign Exchange Rates
- Consolidation and Calculation Status
- Intercompany Matching and Elimination
- Data Management

Day 3
- Data Sources
- Transformation Rules
- Confirmation Rules
- Certification Questions
- Workflow Design
- Extensible Dimensionality, Cubes and Workflows
- Budget/Forecast/Plan

Day 4
- Cube Views
- Dashboards
- Spreadsheet
- Additional Training and Reference Guides

CPE Credits

32 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