



ONESTREAM

CLASSROOM

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/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.

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 +1 (844) 663-3474.

Agenda

Day 1

- OneStream Product Overview
- OneStream Navigation and System Overview
- Design Framework and Extensibility
- Metadata Requirements and Design
 - Scenario Dimension
 - Entity Dimension

Day 2

- Member Formulas
- Continue Metadata Design
 - Flow Dimension
 - Account Dimension
 - User Defined Dimensions
- Cube Design
- Workflow Structure and Design
- Data Collection
 - Origin Dimension
 - Data Sources
 - Transformation Rules

Day 3

- Using Spreadsheet and Quick Views
- Data Entry Forms
- Journal Templates and Central Input
- Calculation Types: Calculation, Translation and Consolidation
- Consolidation Dimension
- Data Management
- Intercompany
- System Tab
 - Logging and Task Activity
 - Database Table Information
 - Environment Monitoring

Day 4

- Data Validations and Quality
 - Confirmation Rules
 - Certification Questions
- Workflow Design and Tools
 - Workflow Channels
 - Workflow Templates
 - Locking Workflows
- Security Design
 - Users and Groups
 - Entity and Workflow Security
 - Security Builder

Day 5

- Reporting
 - Cube Views
 - Dashboards
- Cube Design Recap
 - Cube Types and Data Unit Statistics
 - Entity Aggregation

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

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.

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.

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.