



ONESTREAM
CLASSROOM

Level 2 Financial Model Rules

Course Description

This two-day, hands-on course will cover the Business Rules students need to know in order to implement OneStream XF. The main focus is on the rules needed to create a functioning financial model, but other areas will be covered as well.

Who Should Attend

Only expert administrators who will write rules or advanced implementation services professionals should attend.

Prerequisites and Advanced Preparation

Must have attended the Application Build for Administrators or Application Build for Consultants class.

VB.NET skills and knowledge of Object Oriented concepts are required in order to complete the course material. A suggestion for an overview is Channel 9 on MSDN for Bob Tabor's roughly 8 hours of videos on introduction to key concepts available at <https://channel9.msdn.com/Series/Visual-Basic-Fundamentals-for-Absolute-Beginners>. You can also visit Bob Tabor's site at: <https://bobtabor.com/>. Another resource is www.tutorialspoint.com/vb.net/index.htm and www.functionx.com/vb/index.htm.

Note: This class is taught with exercise material embedded within a PowerPoint file. With the exception of the Rochester location, users will only have one screen to use either on a laptop or monitor. **To avoid having to switch back and forth between the Internet browser and PowerPoint during class exercises, OneStream recommends bringing a laptop or tablet to training in order to display the PowerPoint file separately.**

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.

Complaints should be directed to 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 cancelled 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

- OneStream Finance Engine
- Introduction to Member Formulas
- Your Friends in Financial Rule Writing
- Dynamic Calculation Member Formulas
- Formula for Calculation Drill Down
- Consolidation Process and Cube Settings
- Key VB.Net Concepts
- Stored Calculation Member Formulas

Day 2

- Filtering Stored Calculations
- Sections of a Business Rule
- Advanced Stored Calculations
- Business Rules Attached to Cube
- Scenario Copy Formula Uses
- Calculation Optimization
- Member Lists
- Cube View Business Rule Helpers

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: www.learningmarket.org.

16 CPE Credits are available for attending this course in the areas of Information Technology and Finance. Contact training@onestreamsoftware.com if you have interest.

The program level of this course is advanced.