

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.

Who Should Attend

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

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. Once registration is complete, you will receive a training confirmation and a receipt.

Upon training registration and payment, qualified OneStream Administrators* will be given access to OneStream Academy which is our online training video library. 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 Administrator must meet all of the following:

- Company is a current OneStream Customer which is defined by a mutually signed Software License Agreement
Academy access will not be given until the contract is finalized and signed by both parties.
- Currently employed at a OneStream Customer 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

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 this course. This will ensure all training attendees receive the right skills at the right time to keep the project moving without a long gap between learning and doing.

In the circumstance where training occurs prior to the start of the implementation or a new administrator joins the company after the application is live, we recommend viewing the Application Basics course located in OneStream Academy. This is a four-hour virtual overview introducing key OneStream concepts. Only qualified Administrators will be given Academy access. Please see Registration on Page 1 for more details.

Agenda

Day 1

- OneStream Software Overview
- OneStream Key Concepts
- Dimensions and Members
- Cubes
- Workflow Structure
- Point of View and Application Properties

Day 2

- Data Collection
 - Classifying Workflow Activities
 - Data Sources and Transformation Rules
 - Importing Data
 - Data Entry Forms
 - Journal Templates
- Administrator Workflow Tools
- Financial Model Refinement
 - Member Formulas
 - Foreign Exchange Rates
 - Calculation Types: Calculate, Translate, Consolidate
 - Intercompany Elimination
- Data Management

Day 3

- Workflow Design Requirements
- Additional Data Sources and Transformation Rules
- Data Quality and Information Delivery
 - Confirmation Rules
 - Certification Questions
 - Calculation Definitions
 - Using Cube Views and Dashboards in Workflow
- Multiple Data Collections in One Application
 - Using Scenarios for Multiple Collections
 - Extensible Dimensionality®, Cubes and Workflow
- Spreadsheet
 - Quick Views
 - Cube Views in Spreadsheet

Day 4

- Cube Views
 - Templates
 - Member Filters
 - Calculated Rows and Columns
 - Standard Formatting and Conditional Formatting
 - Parameters
- Dashboard Basics: Dashboard Maintenance Unit
 - Data Adapters and Files
 - Components
 - Layout Types
- Additional Training and Reference Material

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