



# Level 2 Planning Agenda

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## Course Description

This 3-day course covers the main aspects of planning, budgeting and forecasting in OneStream XF while demonstrating how to plan to the level of detail desired and vary it by collection and line of business. In this course you will learn how to set up a OneStream application for planning with a focus on collecting data for Budget and Forecast scenarios via controlled guided Workflows. You will learn the various options and approaches available in OneStream to collect, enter, calculate, manage and report on these data sets.

## Who Should Attend

Only seasoned administrators and OneStream implementers.

## Prerequisites and Advanced Preparation

This is an advanced course. Students must have attended Application Build for Administrators or Application Build for Consultants.

In addition to the course prerequisites above, all attendees must be familiar with the financial model including OneStream Dimensionality and Cubes. All attendees must be very comfortable with concepts such as Workflow, Member Formulas, Finance Business Rules, Cube Views and Dashboards. The basic concepts of these features are covered in the Application Build course and will not be covered in this class.

## Registration

Training registration and payment are completed through our online registration system via the OneStream University website: [www.onestreamsoftware.com/training](http://www.onestreamsoftware.com/training). Payments can be made by credit card. Once registration is complete, you will receive a training confirmation and a receipt.

Complaints should be directed to [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) or OneStream Support Portal at 844-663-3474.

# Agenda

## Day 1:

- Introduction to Planning in OneStream
  - Developing a Planning Process
  - Gathering Requirements and Design Strategy
  - Actual Data Considerations
  - Application Considerations
- Horizontal Extensibility
- Key Scenario Dimension Concepts for Planning
- Cube Design
- Workflow Design Considerations
- Seeding and Custom Calculations

## Day 2:

- Data Entry and Revisions
- Using Drivers and Applying Driver Logic
- Simple Allocation Logic
- Variance Analysis
- Multiple Cube Planning and Linked Cubes
- Entity Dimension Alternatives
- Vertical Extensibility

## Day 3

- Rolling Forecasts
- Advanced Allocation and Driver Based Planning
- Entity Aggregation
- Relational Data Blending
- Security and Performance Considerations

## CPE Credits

24 CPE Credits are available for attending this course in the areas of Accounting and Computer Science. Contact [training@onestreamsoftware.com](mailto: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