

CLASS AGENDA

Application Build for Administrators

Course Description

In this four-day, live course learners practice the hands-on skills needed to build a simple application starting from scratch. By working through several iterations of a build process, learners build a foundation of OneStream skills and knowledge of OneStream features.

Learning Objectives

After completing this course, learners will be able to:

- ✓ Discuss and define key OneStream concepts such as metadata, Cubes, Workflow, Scenario Types, Extensibility, and more
- ✓ Build a simple application from scratch, including adding Dimensions and Members, creating Cubes, setting application properties, building Workflow structure, and more
- ✓ Build Data Sources and Transformation Rules
- ✓ Load data into OneStream through file imports and data entry (Forms and Journals)
- ✓ Refine the financial model in the application through Member Formulas, Foreign Exchange Rates, Calculating data, and Intercompany elimination
- ✓ Build elements to ensure data quality including Confirmation Rules, Certification Questions, and more
- ✓ Use Scenarios for multiple collections
- ✓ Create Cube Views
- ✓ Build basic reports and Dashboards

Who Should Attend

The attendees for this class are limited to OneStream Customer Administrators and OneStream Employees. The program level of this course is beginner.

Prior to Attending Training

Once your project is underway, we recommend learners begin with the OneStream Essentials: Getting Started with OneStream course. Then we suggest allowing three to four weeks before sending Administrators and those who will participate in the Application build to this course. This ensures all attendees receive the right skills at the right time to keep the project moving and avoids 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 learners begin with the on-demand version of the OneStream Essentials: Getting Started with OneStream course. This course, located in OneStream Navigator, provides a timely introduction to key OneStream concepts. Please see Registration for more details. The OneStream Essentials: Getting Started with OneStream course does not require prerequisites or advanced preparation.

Registration

Training registration and payment are completed through our online registration system. Payments can be made by credit card or wire transfer. Once registration



Class Size

Public classes require a minimum of four 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 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 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.NASBARegistry.org.



32 CPE Credits are available for attending this course in the areas of Finance (20) and Information Technology (12). Contact the [Training Support Team](#) if you have interest in CPE Credits for this course.

is complete, you will receive a training confirmation and a receipt. This course is offered as Instructor-Facilitated (group-live/group internet-based).

Upon training registration and payment, qualified OneStream Administrators* will be given access to OneStream Navigator, which is our online training video library. Navigator 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.

Questions? Contact the Training Support Team: training@onestreamsoftware.com.

Agenda

Day 1

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

Day 2

- ✓ Data Collection
 - 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

Day 3

- ✓ Data Management
- ✓ 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 and Cube Views in Spreadsheet

Day 4

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

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 fee charged

Under 7 Days

Full fees charged; no refund

* **A qualified OneStream Administrator must meet all of the following:** ① Company is a current OneStream Customer, which is defined by a mutually signed Software License Agreement. OneStream Navigator access will not be given until the contract is finalized and signed by both parties. ② 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, OneStream Navigator access will not be given until the first date of employment.