



# ONESTREAM

---

## CLASSROOM

## Application Build for Consultants

---

### Course Description

This is a five-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 1 while maintaining the flexibility the system provides for Phase 2.

### 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](http://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](mailto:training@onestreamsoftware.com) or OneStream Support Portal at +1 (844) 663-3474.

## Agenda

### Day 1

- Course Introduction and Overview
- OneStream Product Overview
- Navigation and System Overview
- Design Framework
- Dimensions: Fixed vs. Editable
- Metadata Requirements and Build
  - Time and View Dimensions
  - FX Rates and Application Currencies
  - Scenario Dimension
  - Extensible Dimensionality
  - Entity Dimension

### Day 2

- Member Formulas in OneStream
- Continue Metadata Build/Metadata Builder
  - Flow Dimension
  - User Defined Dimensions
  - Account Dimension
- Cubes
- Workflow Structure
- Data Import
  - Data Sources
  - Transformation Rules
- Workflow Setup and Data Analysis
- QuebecLoad Data Import

### Day 3

- Data Entry Forms
- Journal Templates and Central Input
- Additional Workflow Design Considerations and Tools
- Calculation Types: Calculation, Translation Consolidation
- Consolidation Dimension:
  - Consolidation Process and Performance
  - Performing Consolidations
- Using Data Management for Standard Calculations
- Intercompany

### Day 4

- Data Collection
  - Data sources and Transformation Rules
  - Data Entry Forms
- Data Quality
  - Confirmation Rules
  - Certification Questions
- Varying Data Collections by Scenario
  - Scenario Versioning
  - Extensible Workflow
- Data Management for Custom Calculations and Reset Scenario
- Security

### Day 5

- Cube Views
  - Templates
  - Displaying Culture Descriptions
  - Member Filters
  - Formatting
  - Calculated Columns
  - Dynamic Calculations and Entity Aggregation
- Dashboards
  - Data Adapters
  - Components
- Spreadsheet
  - Quick Views
  - Retrieve Formulas
- Cube Design Review and Data Unit Statistics

## Prerequisites and Advanced Preparation

We recommend viewing the Application Basics course located in OneStream Academy. This is a four-hour virtual overview introducing key OneStream concepts and providing background knowledge about OneStream XF.

**Note:** Only qualified Partners will be given Academy access. Please see Registration on Page 1 for more details.

## 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 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.learningmarket.org](http://www.learningmarket.org).

40 CPE Credits are available for attending this course in the areas of Finance and Information Technology. Contact [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) if you have interest. The program level of this course is beginner.

## 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