



**OS-100: OneStream Certified Associate (OCA) in  
Administration Exam**

Exam Study Guide v1.3



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## Exam Description

Candidates can validate their technical knowledge and competency by becoming a OneStream Certified Associate in Administration based on their specific area of expertise on OneStream 7.x. To achieve this level of certification, candidates must pass this online, proctored exam that is based on a combination of OneStream training material, commonly referenced product documentation, and real-world scenarios. This exam is comprised of traditional multiple-choice items only.

This exam targets IT professionals using OneStream in an Administration role. This certification exam measures candidate knowledge and skill covering the following topics:

- Dimensionality
- Workflow
- Data Collection
- Reporting and Analysis
- Tools

## Recommended Experience

- Aided in a OneStream Application's implementation or 1+ year of Administration experience.
- 1+ year working with OneStream Software in a support or enablement role.
- Has experience/knowledge in areas of Accounting/Finance and/or Information Technology.

If candidates do NOT have prior experience with this product, it is recommended that they complete training, although training alone may not provide a candidate with the knowledge and skills required to pass the exam. If a candidate has experience with OneStream, they may find an online course equivalent to be sufficient. Be cautioned that attendance in a training course does NOT guarantee passage of a certification exam. A combination of training and successful, on-the-job experience are critical to providing candidates with the knowledge and skills needed to pass the exam.



## What to Expect While Taking an Exam

The exam will be online and remotely proctored through video.

With the freedom to take a remotely proctored exam, it is the candidate's responsibility to ensure they have the necessary hardware (e.g., computer, large enough monitor, built in webcam or external USB webcam, power cords) and stable internet connectivity. Note that if a candidate chooses to use an external monitor instead of a laptop monitor, the candidate is responsible for providing their own external webcam for use during exam remote proctoring.

To aid in a successful testing experience, candidates should take these important steps to be sure that they will be able to take the test:

1. Confirm that your system meets the [Technical Requirements](#) for taking this exam.
2. Perform an [Examiity system requirements](#) check for remote proctoring.
3. Verify both [GoToMeeting](#) and [Zoom](#) run by using these sample meetings.
4. Verify your sound, camera, and microphone all function in both sample meetings.
5. Use a supported browser: Chrome, Firefox, or Edge. (NOTE: Safari and Internet Explorer are unsupported.)
6. Verify you can complete this [5-question quiz](#) **PRIOR** to exam day.
7. Turn off your popup blocker. (Day of exam – if you may forget on the day of the exam, turn it off now while you are performing checks.). If test-takers have their pop-up blocker enabled, there could be a delay when launching the exam session. When candidates select Connect to Proctor, that button initiates the screen share application. If that does not launch properly or immediately, it can feel as though the proctor is not available, though they are in the screen share session.
8. For best results, test on a non-work computer. There may be security configurations on your work computer that could affect exam performance.
9. If you experience issues using a company computer or sitting at work, ask your IT department to follow the instructions in [this guide](#), which may resolve the issues.

Familiarize yourself with the exam platform by watching the video: [What to Expect While Taking An Exam](#).

## Study References

### OneStream Training

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## Recommended Course and Webinars

- [Course: Application Build for Administrators](#)
- OneStream Navigator Recordings: OneStream Certified Associate (OCA) in Administration Exam Prep Webinars

To learn about current training opportunities, please submit a case form to the Training team via the [ServiceNow Support Portal](#).

### Documentation

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- OneStream Design and Reference Guide
- Knowledge Base Articles (specified below per exam objective)

### OneStream Websites

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- [OneStream Training Website](#)
- [OneStream Certification Program Website](#)



## Exam Objectives

The following tables list the OneStream Certified Associate in Administration exam objectives and how these objectives align to the corresponding OneStream Navigator course topics and any associated lab exercises and commonly referenced product documentation.

Candidates are encouraged to complete applicable exercises as part of their preparation for the exam.

### Exam Section 1: Dimensionality (Weighting: 15%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>100.1.1: Review application metadata.</li> </ul>	<ul style="list-style-type: none"> <li><b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li><b>Sections:</b> Dimensions and Members, POV and Application Properties, Account Dimension</li> </ul> </li> <li><b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Cube”, “Formula Guide”, “Financial Model Guides”</li> </ul>
<ul style="list-style-type: none"> <li>100.1.2: Outline core properties required when creating Dimensions.</li> </ul>	<ul style="list-style-type: none"> <li><b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li><b>Sections:</b> Account Dimension, Entity Dimension, Fixed Dimensions, Intercompany (IC)</li> </ul> </li> <li><b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Cube”</li> </ul>
<ul style="list-style-type: none"> <li>100.1.3: Recognize the basic properties to apply when creating a Cube.</li> </ul>	<ul style="list-style-type: none"> <li><b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li><b>Sections:</b> Cubes, Extensible Workflow</li> </ul> </li> <li><b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Cube”</li> </ul>
<ul style="list-style-type: none"> <li>100.1.4: Identify how FX Rates are integrated within OneStream.</li> </ul>	<ul style="list-style-type: none"> <li><b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li><b>Sections:</b> Foreign Exchange Rates (with associated exercises), Cubes</li> </ul> </li> <li><b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Foreign Exchange Rates”</li> </ul>

### Exam Section 2: Workflow (Weighting: 19%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>100.2.1: Identify the relationship between the Cube and Workflow.</li> </ul>	<ul style="list-style-type: none"> <li><b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li><b>Section:</b> Cubes (with associated exercises)</li> </ul> </li> <li><b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Workflow Guides”</li> </ul>

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>• <b>100.2.2:</b> Outline how to maintain the Workflow Structure.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Workflow Activities, Cube Views in the Workflow</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Workflow Guides”, “Foundation Guides”, “Workflow”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.2.3:</b> Differentiate between Workflow Properties.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Workflows, Entity Dimension</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Workflow Guides”, “Workflow”, “Application Tools”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.2.4:</b> Apply Calculation Definitions correctly.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Section:</b> Calculation Definitions</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters, “Workflow Guides”, “Financial Model Guides”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.2.5:</b> Assign Entities to Workflow.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Workflow Guides”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.2.6:</b> Define how to lock and/or certify a Workflow Profile.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> POV and Application Properties, Administrator Workflow Tools, Workflow Data Requirements</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Workflow Guides”, “Workflow”, “Application Tools”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.2.7:</b> Outline how to maintain Security in the Workflow.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Journals, Workflow Data Requirements</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Workflow Guides”, “Workflow”</li> </ul>

### Exam Section 3: Data Collection (Weighting: 18%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>• <b>100.3.1:</b> Recognize which Profile Type to use.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Section:</b> Workflows</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Workflow Guides”, “Workflow”</li> </ul>

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>• <b>100.3.2:</b> Compare the Data Source use cases.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Section:</b> Fixed File Data Sources (with associated exercises)</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Data Collection”, “Data Collection Guides”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.3.3:</b> Differentiate between Transformation Rule Types.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Section:</b> Additional Transformation Rules</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Data Collection”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.3.4:</b> Identify how to make a Form.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Section:</b> Cube Views (and associated exercises)</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Data Collection”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.3.5:</b> Identify how to create a Journal Template.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Section:</b> Journals</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Data Collection Guides”, “Data Collection”</li> </ul>

#### Exam Section 4: Reporting and Analysis (Weighting: 30%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>• <b>100.4.1:</b> Recall the importance of Groups and Profiles.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Section:</b> Transformation Rules</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Presentation”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.4.2:</b> Differentiate between Cube View properties and settings.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Complete Workflow Profiles and Import Balance Files, Formatting</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Foundation Guides”, “Presenting Data With Books, Cube Views and Other Items”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.4.3:</b> Identify how to create a dynamic Cube View.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Member Formulas, Parameters, Member Filters, Cube Views</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Presenting Data With Books, Cube Views and Other Items”, “Data Collection Guides”, “Cube”</li> </ul>



Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>• <b>100.4.4:</b> Identify how to query data in the Excel Add-in/Spreadsheets.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Spreadsheet, Data Sources (and associated exercises)</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Getting Started with Excel Add-In”, “Navigating the Excel Add-In”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.4.5:</b> Identify how to navigate the Member Filter.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Scenario Dimension, Dimensions and Members</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Cube”, “Presenting Data With Books, Cube Views and Other Items”, “Data Collection Guides”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.4.6:</b> Recall the POV priority.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> POV and Application Properties, Member Filters</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Presenting Data With Books, Cube Views and Dashboards”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.4.7:</b> Outline the components of a Dashboard Maintenance Unit.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Parameters, Dashboard Files and Data Adapters, Dashboard Components (and associated exercises)</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Presenting Data With Books, Cube Views and Other Items”, “Parameter Guides”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.4.8:</b> Identify when to apply preferences and other options in the Excel Add-in toolbar.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Quick Views, Spreadsheet Retrieves</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Getting Started with Excel Add-In”, “Navigating the Excel Add-In”</li> </ul>

### Exam Section 5: Tools (Weighting: 18%)

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>• <b>100.5.1:</b> Differentiate between Data Management Step Types.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Data Management, Scenario Dimension</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapter “Application Tools”</li> </ul>

Exam Objectives	Applicable Course Content
<ul style="list-style-type: none"> <li>• <b>100.5.2:</b> Identify how to load/extract Application artifacts.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Application Tools”, “Foundation Guides”, “Navigation”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.5.3:</b> Identify how to maintain the file explorer.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Navigation, POV and Application Properties</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “System Tools”, “Applications Tools”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.5.4:</b> Differentiate between Application properties.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Foreign Exchange Rates, POV and Application Properties (and associated exercises)</li> </ul> </li> <li>• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters “Applications Tools”, “Presenting Data With Books, Cube Views and Other Items”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.5.5:</b> Review Task Activity.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> System Administrator, Security</li> </ul> </li> <li>• <b>Documentation:</b> Design and Reference Guide, Chapters “System Tools”, “Logging”, “Application Tools”, “Foundation Guides”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>100.5.6:</b> Recognize common Application and System Security Roles.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Course:</b> Application Build for Administrators               <ul style="list-style-type: none"> <li>• <b>Sections:</b> Entity Dimension, Security</li> </ul> </li> </ul>

For questions related to the certification process or exam, please submit a case form to the Certification team via the [ServiceNow Support Portal](#).



## Sample Exam Questions

Review the following sample questions prior to taking an exam to gain a better understanding of the types of questions that will be presented on the exam.

The sample exam allows candidates to see the type and format of questions that will be encountered in the actual exam. Sample exam results do NOT predict a candidate's actual test results.

1. **An Administrator wants to lock and certify all steps in a Workflow for all periods, using a single batch operation.**

**Which screen should the Administrator visit to do this?**

- A. Workflow Status
- B. Workflow Multi-Period Processing
- C. Workflow Audit

2. **Which Workflow Profile Type should an Administrator use to enable importing data to Entity Members in the Cube?**

- A. Parent Input
- B. Review
- C. Base Input

3. **An Administrator is setting up a List mapping to create a delimited list of Members that all map to the same target.**

**Which Rule Expression should the Administrator use to create the mapping?**

- A. 90210;90213;90218
- B. 90210~90213~90218
- C. 90210-90213-90218

4. **An Administrator wants to add an editable text column to a Cube View.**

**Which Dimension contains the Members to accomplish this?**

- A. Time
- B. Origin
- C. View

5. **Data Adapters can be attached to which Dashboard Component Type?**

- A. List Box
- B. Cube View
- C. Chart (Advanced)



6. **Which two Data Management Steps create audit information for each data cell affected? Select two.**
  - A. Reset Scenario
  - B. Clear Data
  - C. Custom Calculate
  - D. Calculate
  
7. **Which file type should an Administrator use to load Application artifacts?**
  - A. XLS
  - B. XML
  - C. CSV
  
8. **How should a User save a Cube POV to the File Explorer so that it can be used later?**
  - A. Right-click the Cube POV and select "Copy Cube POV"
  - B. Right-click the Cube POV and select "Save Cube POV To Favorites"
  - C. Right-click the Cube POV and select "Save Cube POV As Initial POV For New Users"
  
9. **Where should an Administrator maintain currencies in OneStream?**
  - A. In the Application Configuration file
  - B. On the System tab > Environment, then select an Application Server on the Configuration tab
  - C. On the Application tab > Application Properties > General Tab > Currency Filter
  
10. **What information within Task Activity is available to an Administrator?**
  - A. User Logon Activity and through which Client Module
  - B. Detailed error logging
  - C. Duration of a specific Task

*\* Answer key and rationales provided on next page*

## Sample Exam Question Answers

1. B, (A can be accessed for individual periods and allows the Status and Assigned Entities to be reviewed, and C is used to see how many times each task in a Workflow was performed, along with the results.)
2. C, (A is used to allow adjustments to Parent Entities in the Cube and B will not allow you to input data on a Review Profile type.)
3. A, (List Mapping uses a ; separator. In B the ~ is used by Range Mapping as a separator and in C the – is not supported in rule writing.)
4. C, (The Time and Origin Dimensions do not have text members.)
5. C, (There is not a Data Adapter tab on A and B)
6. B & D, (A and C do not create audit information for each data cell affected.)
7. B, (XML files are used to import and export sections of the Application.)
8. B, (A copies a Cube POV to the clipboard and C will use the selected Cube POV as the initial POV for new Users of the system.)
9. C, (Currency settings are not available in A and B)
10. C, (A is provided by the Logon Activity and B is provided by the Error Log)