OneStream® Navigator

▣ ONESTREAM MARKETPLACE

ONESTREAM FINANCIAL CLOSE

Implementing OFC Transaction Matching

The OneStream MarketPlace: Implementing OFC Transaction Matching course is geared toward those who plan to implement the Transaction Matching MarketPlace solution into their OneStream application. This course introduces the purpose and benefits of the Transaction Matching solution and explains how to upload the solution into an application. Additionally, this course covers typical use cases, what it looks like to view and test the solution, the fundamental components of the solution, how to apply testing and validation, and common troubleshooting techniques.

Learning Objectives

After completing this course, learners will be able to:

- ☑ Define the Transaction Matching solution.
- ☑ Identify the purpose of the Transaction Matching solution.
- ☑ Identify the key pages and components of the solution.
- ☑ Define the most common use cases for the solution.
- ☑ Identify how settings and security are configured.
- ☑ Implement components of end-user testing.
- ☑ Execute testing and validation in the Transaction Matching solution.
- ☑ Identify and resolve common errors.

Who Should Take This Course

This course is intended for seasoned administrators and OneStream implementers.

Prerequisites and Advanced Preparation

Prior to taking this course, you should complete the following courses, or possess equivalent knowledge:

- ☑ OneStream Essentials: Getting Started with OneStream
- ☑ OneStream Essentials: Implementing OneStream
- ☑ OneStream Essentials: Configuring Core Application Security
- ☑ Equivalent 1 year experience with the OneStream platform
- ☑ OneStream Essentials: OneStream Administration
  or
- ☑ Application Build for Administrators

Registration

This course is offered as self-paced On-Demand.

Questions? Contact the Training Support Team by submitting a case form on the ServiceNow Support Portal.

Agenda

The following topics will be covered:

- ☑ Overview of the Transaction Matching solution
- ☑ Navigating the Transaction Matching solution
- ☑ Transaction Matching solution design approach
- ☑ Preliminary setup
- ☑ Solution settings, such as the Settings page, Security, Match Set Administration page, and the OnePlace tab
- ☑ Testing and validation, such as end-user testing, data validation, reports, typical use cases, and security
- ☑ Troubleshooting common errors
- ☑ Resources

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