

COURSE DESCRIPTION

ONESTREAM ESSENTIALS

OneStream Administration

This course has been designed to build on the topics learned in the OneStream Essentials: Getting Started with OneStream course. Using an existing application, the course will help develop administrator competencies for modifying core platform artifacts (such as dimensionality, workflow, data sources, and transformation rules) and troubleshooting skills for a variety of common issues.

The course content has been created assuming that it will be used by a OneStream administrator as a supplemental resource to any design documentation provided by a consultant. Content has avoided, where possible, a Planning or Consolidation focus as these topics will be dealt with in other courses and learning resources.

Learning Objectives

After completing this course, learners will be able to:

- ✓ Manage Users and Leverage Support Resources
- ✓ Manage Dimensions
- ✓ Work with Cubes & Extensibility
- ✓ Build and Update Workflow Profiles
- ✓ Manage and Maintain Data Import Artifacts
- ✓ Manage and Maintain Data Entry Workflows and Artifacts
- ✓ Revise and Update Workflows Processes
- ✓ Utilize Administrator Tools

Who Should Take This Course

This course is intended for those who are early in their OneStream journey and responsible for administering OneStream applications.

Prerequisites and Advanced Preparation

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

- ✓ OneStream Essentials: Getting Started with OneStream

In addition, you are also required to have a working Okta account.

Registration

Training registration and payment are completed through our online registration system. Payments can be made by credit card or wire transfer. Once registration is complete, you will receive a training confirmation and a receipt. This course is offered as Instructor-Led (group live-facilitated/group internet-based) and self-paced On-Demand.

Duration

- ✓ Instructor-Led: 3-Day
- ✓ On-Demand: 12 Hours

Questions? Contact the Training Support Team by submitting a case form on the [ServiceNow Support Portal](#).



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.



24 CPE Credits are available for attending this course in the areas of Finance (16) and Information Technology (8). Contact the [Training Support Team](#) if you have interest in CPE Credits for this course.

Agenda

Day 1

- ✓ Introduction to the Administrator Role
- ✓ Application Tools for Administrators
- ✓ Managing Users, Application Extracts, and Distinguishing Environments
- ✓ Application Properties
- ✓ Working with Dimensions and Members
- ✓ Working with Extensibility
- ✓ Working with Cubes

Day 2

- ✓ Building the Workflow
- ✓ Data Sources
- ✓ Transformation Rules
- ✓ Configuring the Workflow for Data Import
- ✓ Importing Data
- ✓ Options for Data Entry
- ✓ Setting up Form Templates
- ✓ Manual Data Entry Using Forms

Day 3

- ✓ Investigating Data
- ✓ Processing the Workflow
- ✓ Confirming Data Quality
- ✓ Signing Off the Data
- ✓ Workflow Administration Tools
- ✓ Comparing and Extracting Metadata
- ✓ Communicating Changes with Dashboards
- ✓ Considering an Upgrade
- ✓ Upgrading
- ✓ Increasing Your Knowledge

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.

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