

OneStream Certification Exam Registration Process

A Step-by-Step Guide

August 29, 2025

For questions, please submit a case form to the Certification team via the [ServiceNow Support Portal](#)



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Login to CM Connect

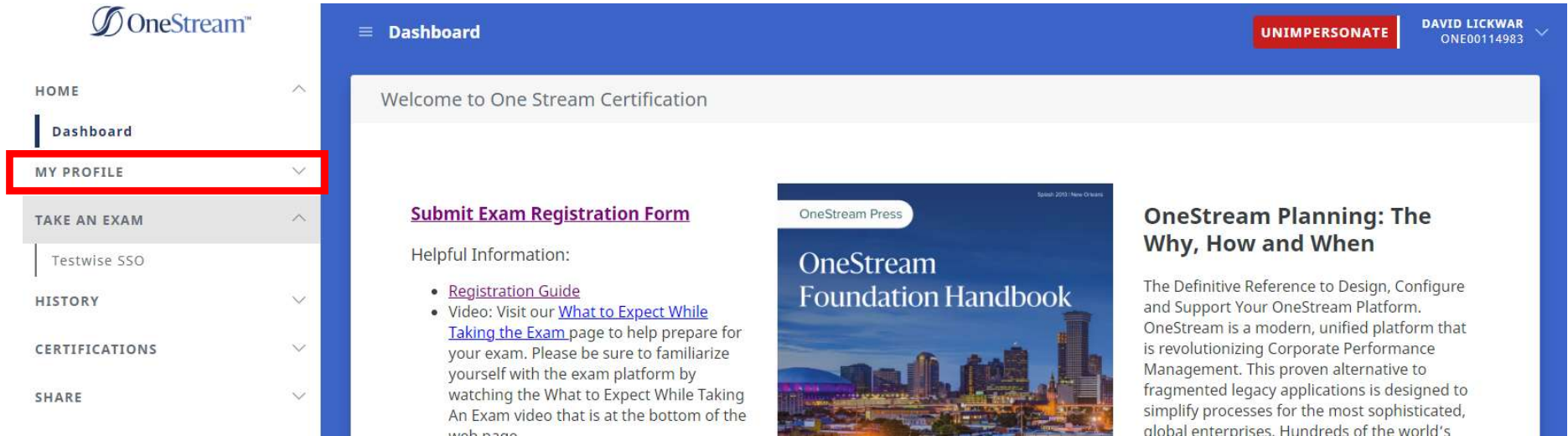
- Click on CM Connect (formerly CertMetrics) in your OneStream Portal



- If you do not have this option in your OneStream Portal, submit a case form or have a member of your team submit a case form to Account Maintenance via the ServiceNow Support Portal
- Additionally, candidates can navigate to <https://osportal.onestream.com/> to access the OneStream Portal and CM Connect

Confirm Your CM Connect Profile

From the CM Connect home page click on the **My Profile** link



The screenshot displays the OneStream CM Connect dashboard. On the left, a sidebar contains navigation links: HOME, Dashboard, MY PROFILE (highlighted with a red box), TAKE AN EXAM, Testwise SSO, HISTORY, CERTIFICATIONS, and SHARE. The main content area has a blue header with a 'Dashboard' label, a 'UNIMPERSONATE' button, and the user's name 'DAVID LICKWAR' with ID 'ONE00114983'. Below the header, a 'Welcome to One Stream Certification' message is shown. The main content area is divided into three sections: 'Submit Exam Registration Form' with a link to the 'Registration Guide' and a video link 'What to Expect While Taking the Exam'; a 'OneStream Press' section featuring the 'OneStream Foundation Handbook' with a cityscape image; and a 'OneStream Planning: The Why, How and When' section with a descriptive paragraph.

Confirm Your CM Connect Profile

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HOME

MY PROFILE

My Information

Addresses

Options

Settings

HISTORY

CERTIFICATIONS

SHARE

My Information

Review and update your demographic information. Below are the different IDs assigned to your account including Testing IDs and System IDs.

Personal Information

First Name
Rick

Last Name
Mestler

Email Address*
rmestler@onestreamsoftware.com

Company Name
OneStream Software

UPDATE INFORMATION

UNIMPERSONATE

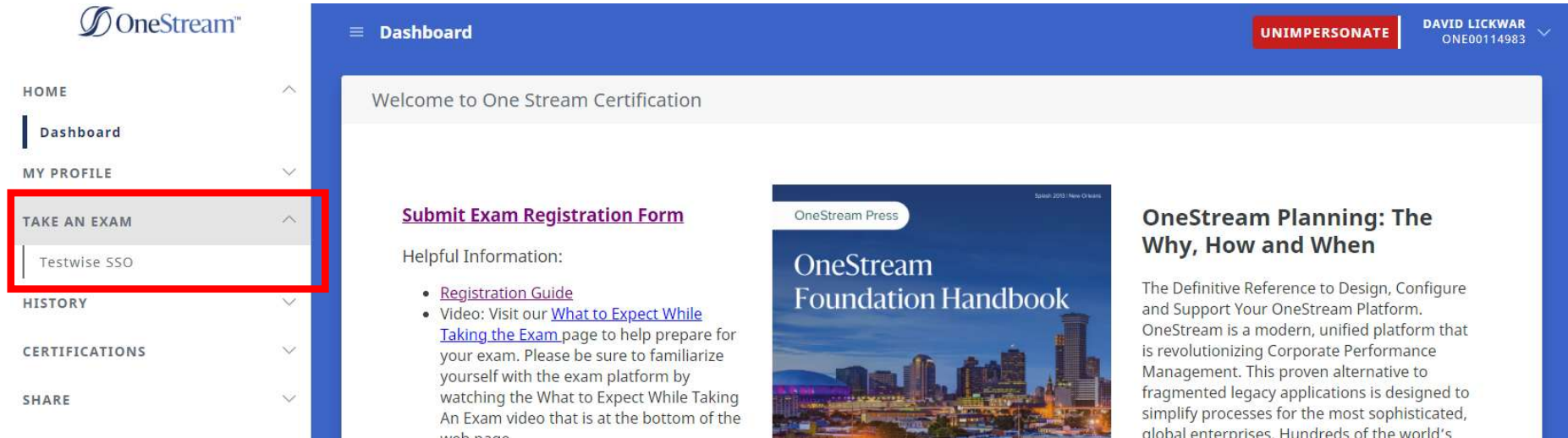
RICK MESTLER
ONE00115231

Confirm that your profile information is correct

- If your name in CM Connect does not match your government-issued ID, submit a case form to the Certification team via the [ServiceNow Support Portal](#)
 - If your name in CM Connect doesn't match your government-issued ID, you might **NOT** be able to sit for your exam and you will forfeit your exam fee

Register for an Exam

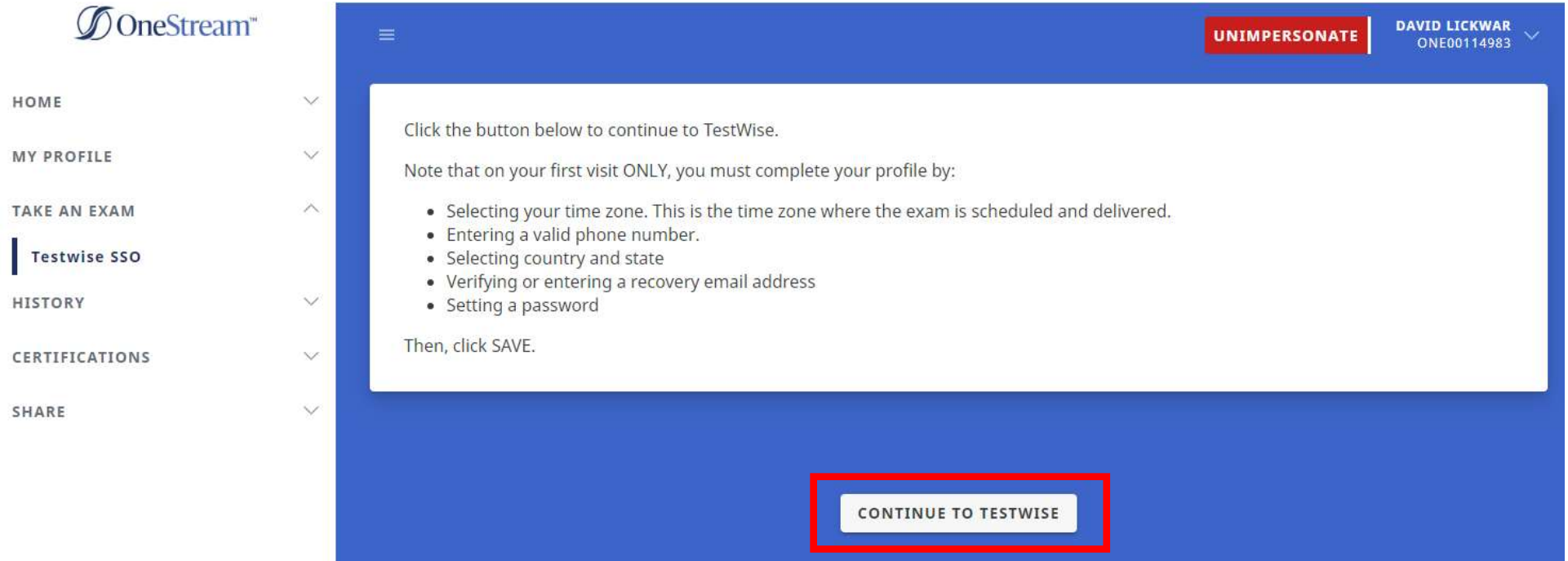
- On the CM Connect homepage, expand **“Take an Exam”** on the left
- Click **“TestWise SSO”** to register for an exam



The screenshot displays the OneStream Certification Dashboard. On the left sidebar, the 'TAKE AN EXAM' option is highlighted with a red rectangular box, and its sub-item 'Testwise SSO' is visible below it. The main content area features a 'Welcome to One Stream Certification' message, a link to 'Submit Exam Registration Form', and a section titled 'Helpful Information:' containing links to a 'Registration Guide' and a video about 'What to Expect While Taking the Exam'. To the right of the text is a promotional image for the 'OneStream Foundation Handbook' with the text 'OneStream Press' and 'Spring 2020 - New Orleans'. Further right is a section titled 'OneStream Planning: The Why, How and When' with a descriptive paragraph about the platform.

Register for an Exam

- When the page reloads, read the important message(s) and then click **“Continue to TestWise”**



The screenshot shows the OneStream TestWise SSO interface. On the left is a navigation menu with links: HOME, MY PROFILE, TAKE AN EXAM, Testwise SSO (highlighted), HISTORY, CERTIFICATIONS, and SHARE. The main content area has a blue header with a hamburger menu icon, a red 'UNIMPERSONATE' button, and the user name 'DAVID LICKWAR' with ID 'ONE00114983'. Below the header, a white box contains instructions: 'Click the button below to continue to TestWise. Note that on your first visit ONLY, you must complete your profile by:' followed by a bulleted list of five steps: selecting time zone, entering phone number, selecting country/state, verifying/recovery email, and setting a password. It concludes with 'Then, click SAVE.' At the bottom center, a white button labeled 'CONTINUE TO TESTWISE' is highlighted with a red rectangular border.

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HOME

MY PROFILE

TAKE AN EXAM

Testwise SSO

HISTORY

CERTIFICATIONS

SHARE

UNIMPERSONATE

DAVID LICKWAR
ONE00114983

Click the button below to continue to TestWise.

Note that on your first visit ONLY, you must complete your profile by:

- Selecting your time zone. This is the time zone where the exam is scheduled and delivered.
- Entering a valid phone number.
- Selecting country and state
- Verifying or entering a recovery email address
- Setting a password

Then, click SAVE.

CONTINUE TO TESTWISE

Complete your TESTWise Profile

Verify the information in your profile is correct

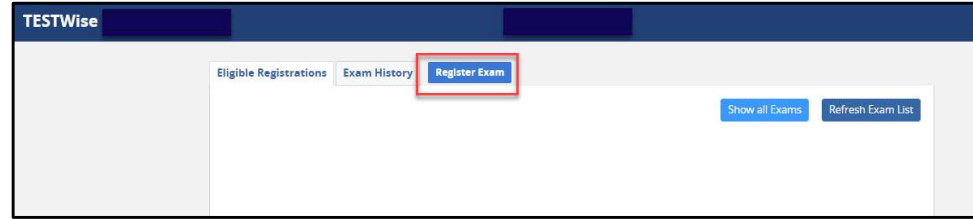
NOTE: This is only done the first time you visit TestWise

- You will be unable to change your name or email address on file. Submit a case form to the Certification team via the [ServiceNow Support Portal](#) to update that information
- Confirm your first and last name match what is on your legal ID that will be used on exam day. If a change is needed, contact OneStream immediately.
- Ensure the following is present:
 - Your time zone is correct
 - **NOTE:** This is the time zone your exam is scheduled in
 - A valid phone number
 - Country
 - State
 - Set your recovery Email Address
- Click **“Set Password”** to set a TestWise password
- Click **Save Profile**

The screenshot shows the 'Edit Profile' interface. The 'Candidate Profile' tab is active. Fields for personal information are present, with red boxes highlighting the 'Country' and 'Time Zone' dropdowns, the 'Phone' field, the 'State' dropdown, the 'Recovery Email Address' field, and the 'Set Password' button. The 'Save Profile' and 'Cancel' buttons are at the bottom right.

Schedule an Exam

- 1 Click Register Exam to schedule your exam

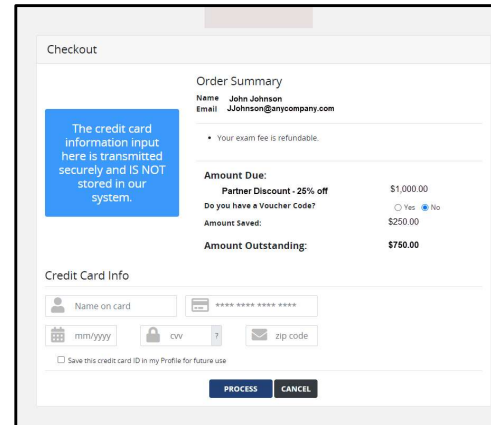


- 2 Click the “**Register**” button that corresponds to the desired exam



- 3 After entering payment information, candidates will be redirected to MonitorEDU to schedule exam

NOTE: All exams are delivered virtually; OneStream Certification exams are NOT offered in test centers



Schedule an Exam

- Click **“Schedule Proctor”**
- Select the date you’d like to take your exam
- Select the time you’d like to take your exam
 - Your scheduled time will be the time zone in your profile information
- Click the **“Submit”** button
- After scheduling your proctor, close the MonitorEDU web browser tab.
- **NOTE:** The TESTWise screen will automatically update to show your scheduled appointment date. If not, click **“Refresh Exam List”**.

Eligible Registrations Exam History

WEB Designer

Examination Window Aug 8, 2019 06:00 am MDT
Sep 1, 2020 05:59 am MDT

Appointment Date Not Scheduled (Click the button below to schedule a proctor time)

Schedule Proctor

Refresh Exam List

MonitorEDU

Please select an exam date and start time

Your Name

your@email.com

Your Exam Name

Exam Window: 2022-09-13 - 2032-09-13

mm/dd/yyyy 1

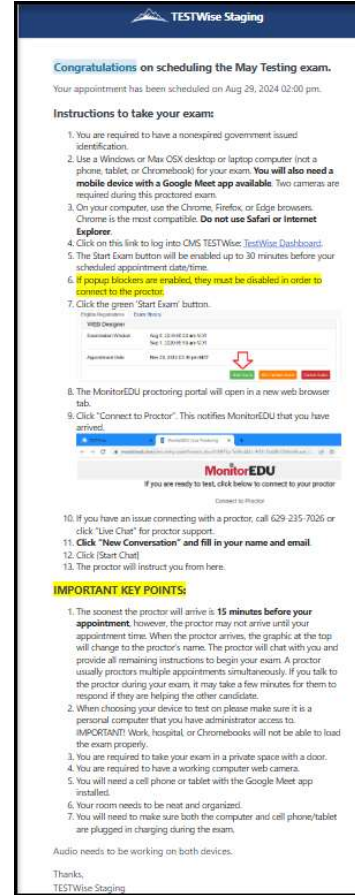
All times are in your local time zone

Select a Time 2

Submit 3

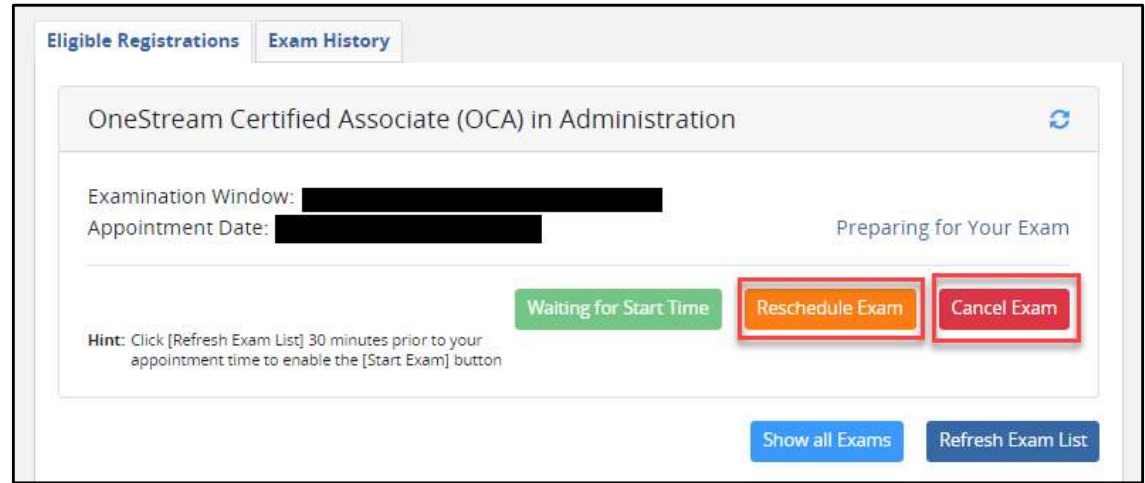
Confirming of your Appointment

- After scheduling and paying, an email with your appointment details will be sent to you from TestWise.
- Retain this email until after your appointment date; it is the ONLY communication you will receive regarding your scheduled appointment and appointment URL
- Use a non-work computer and a personal Wi-Fi connection to take your exam.
- If you are unprepared and therefore unable to take your test, your appointment will be used, and you will be required to contact your test sponsor to pay for and reregister for another attempt.
- On exam day, log into CM Connect and SSO to TestWise 15 minutes before your exam appointment.



Reschedule/Cancel your Exam Appointment

- Login to CMS TESTWise through CM Connect.
- On the dashboard, click **“Reschedule Exam”** or **“Cancel Exam”**
- The MonitorEDU proctoring portal will open in a new web browser tab. Follow prompts.
- When you are finished in the MonitorEDU portal, close the browser tab. Click **“Refresh Exam List”** in the TESTWise screen to see any changes that were made in the MonitorEDU portal.
- If you cancelled, the three buttons will change to a **“Schedule Proctor”** button, and you will be able to reschedule.

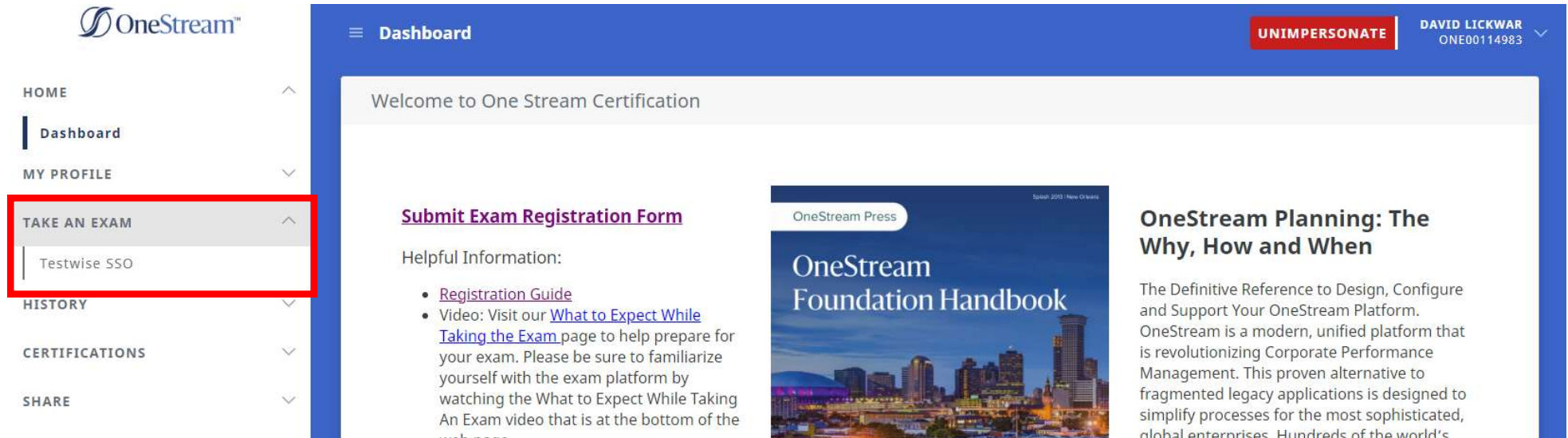


NOTE:

- Candidates can reschedule or cancel an exam up to 24 hours before a scheduled exam without a fee/penalty
- Rescheduling or canceling an exam within 24 hours of an existing appointment will result in a \$5 late fee (payable the next time you schedule a proctor)
- Candidates who do NOT appear for a scheduled exam, or who attempt to cancel or reschedule after their appointment begins, will forfeit the entire exam fee and must pay for another attempt.

On Exam Day

- Log into CM Connect.
- On the homepage, expand **“Take an Exam”** on the left.
- Click **“TestWise SSO”** to navigate to TestWise.



The screenshot displays the OneStream dashboard interface. On the left sidebar, the 'TAKE AN EXAM' menu item is highlighted with a red rectangle, and its sub-item 'Testwise SSO' is visible below it. The main content area features a 'Welcome to One Stream Certification' message, a 'Submit Exam Registration Form' link, and a 'Helpful Information' section with links to a 'Registration Guide' and a video. A featured article titled 'OneStream Planning: The Why, How and When' is also present, along with a 'OneStream Foundation Handbook' graphic.

OneStream™

Dashboard

UNIMPERSONATE

DAVID LICKWAR
ONE00114983

HOME

Dashboard

MY PROFILE

TAKE AN EXAM

Testwise SSO

HISTORY

CERTIFICATIONS

SHARE

Welcome to One Stream Certification

[Submit Exam Registration Form](#)

Helpful Information:

- [Registration Guide](#)
- Video: Visit our [What to Expect While Taking the Exam](#) page to help prepare for your exam. Please be sure to familiarize yourself with the exam platform by watching the What to Expect While Taking An Exam video that is at the bottom of the web page.

OneStream Press

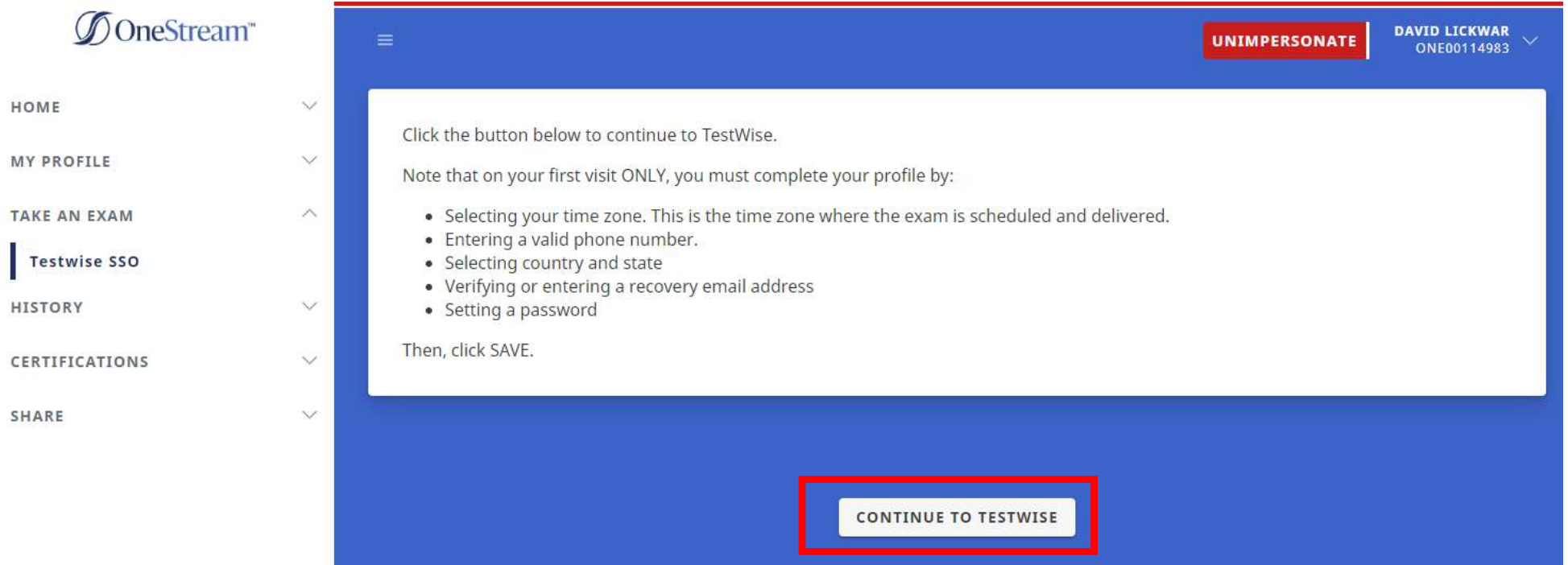
OneStream Foundation Handbook

OneStream Planning: The Why, How and When

The Definitive Reference to Design, Configure and Support Your OneStream Platform. OneStream is a modern, unified platform that is revolutionizing Corporate Performance Management. This proven alternative to fragmented legacy applications is designed to simplify processes for the most sophisticated, global enterprises. Hundreds of the world's

On Exam Day

- When the page reloads, click **“Continue to TestWise”**



The screenshot displays the OneStream TestWise SSO interface. On the left is a navigation menu with the OneStream logo at the top, followed by links: HOME, MY PROFILE, TAKE AN EXAM, Testwise SSO (highlighted with a blue bar), HISTORY, CERTIFICATIONS, and SHARE. The main content area has a blue header with a hamburger menu icon, a red 'UNIMPERSONATE' button, and a user profile for DAVID LICKWAR (ONE00114983). Below the header, a white box contains the following text: 'Click the button below to continue to TestWise. Note that on your first visit ONLY, you must complete your profile by:'. This is followed by a bulleted list: 'Selecting your time zone. This is the time zone where the exam is scheduled and delivered.', 'Entering a valid phone number.', 'Selecting country and state', 'Verifying or entering a recovery email address', and 'Setting a password'. Below the list, it says 'Then, click SAVE.'. At the bottom center, a white button labeled 'CONTINUE TO TESTWISE' is highlighted with a red rectangular border.

OneStream™

HOME

MY PROFILE

TAKE AN EXAM

Testwise SSO

HISTORY

CERTIFICATIONS

SHARE

UNIMPERSONATE

DAVID LICKWAR
ONE00114983

Click the button below to continue to TestWise.

Note that on your first visit ONLY, you must complete your profile by:

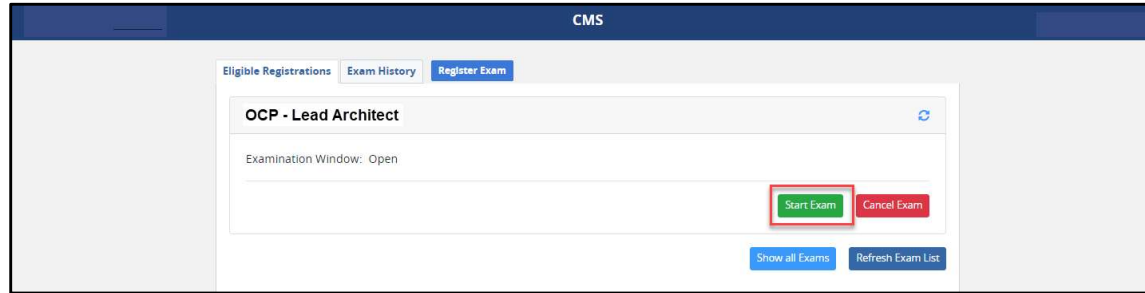
- Selecting your time zone. This is the time zone where the exam is scheduled and delivered.
- Entering a valid phone number.
- Selecting country and state
- Verifying or entering a recovery email address
- Setting a password

Then, click SAVE.

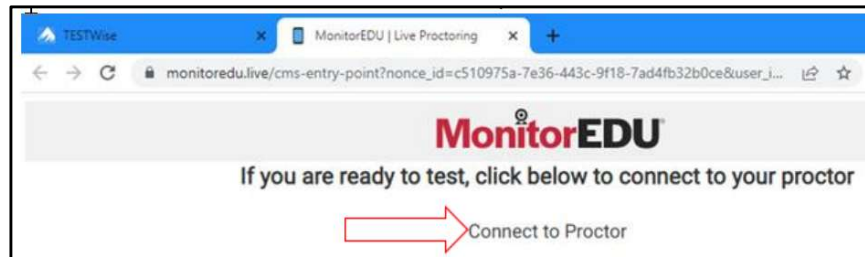
CONTINUE TO TESTWISE

On Exam Day

- Click the **GREEN** button labeled **“Start Exam”** 15 minutes prior to your exam time to begin your exam appointment.



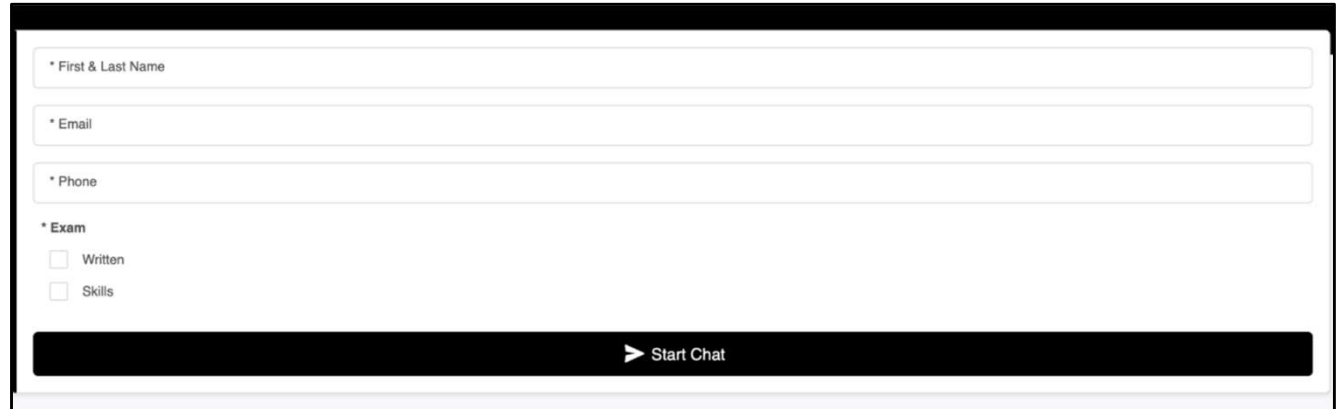
- The MonitorEDU proctoring portal will open in a new web browser tab.
- Click **“Connect to Proctor”**. This notifies MonitorEDU that you have arrived.



Issues connecting? Call 1-629-235-7026 or click “Live Chat” for proctor support.

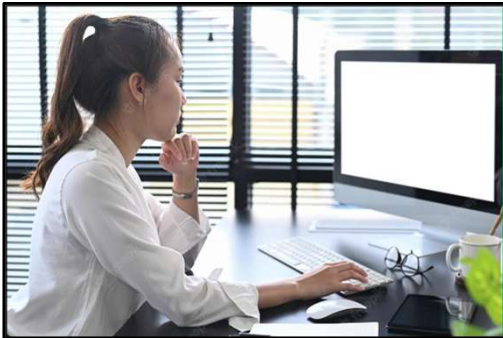
Populate Candidate Information and Connect to Proctor

- The soonest the proctor will arrive is 15 minutes before your appointment, however, the proctor may NOT arrive until your appointment time.
- When the proctor arrives, the graphic at the top will change to the proctor's name. The proctor will chat with you and provide all remaining instructions to begin your exam.
 - A proctor usually **proctors multiple appointments simultaneously**. If you talk to the proctor during your exam, it may take a few minutes for them to respond if they are helping the other candidate
- Complete these fields prior to the proctor joining:
 - Click **“Start Chat”**
 - A proctor will then greet you and get you connected with your mobile device using Google Meet.

A screenshot of a web form for candidate information. The form has a white background with a black border. It contains four input fields: '* First & Last Name', '* Email', and '* Phone', each with a small asterisk icon on the left. Below these is a section for '* Exam' with two radio button options: 'Written' and 'Skills'. At the bottom of the form is a black button with a white right-pointing arrow and the text 'Start Chat'.

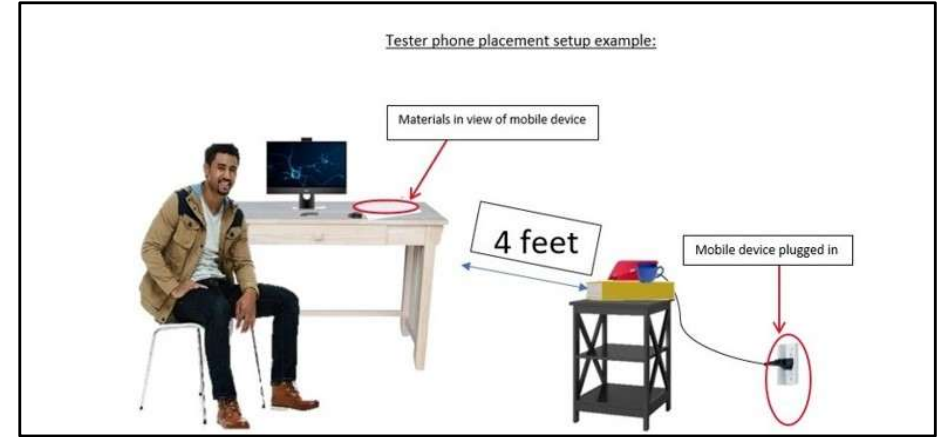
Using Your Mobile Device for Proctoring

- In addition to your computer, you must have a cell phone or tablet.
 - You will need to make sure both the computer and cell phone/tablet are plugged in and charging during the exam. Audio must work on both devices.
- Although a proctor will walk you through each of the details below, the following will provide you with an idea of what will happen and what will be needed. These things will not always necessarily happen in this order.
- Once the proctor arrives, they will send you a google meet code that you will connect on your mobile device, after that you will be speaking to the proctor, rather than typing chats.
 - The proctor will then send you a URL to connect to MonitorEDU on the computer.
 - The proctor will send you the rules for MonitorEDU and any specific rules about the exam.
 - You will need to show your government-issue ID.
 - You will complete a 360-degree scan of your room. See www.monitoredu.com/faq for specific details of how to set up your room.
 - Desk surface needs to be clear of any non-exam related materials as in the following images:



Using Your Mobile Device for Proctoring

- Anything behind you needs to be covered and/or taken down.
- While you **may NOT use dual monitors** during your exam, you **MAY use a larger external monitor provided the laptop is CLOSED**. As a result, you must provide an external webcam because the laptop will be closed.
 - The proctor will ask you to place your mobile device carefully so that you and your screen can be seen easily. This may take some time, so be prepared.
- The proctor will ask you to open Task Manager (on a Windows machine, ctrl-alt-delete; on Mac, Finder) and check to make sure you are not running any extra programs.
- The proctor will ask you to make sure that remote access to your machine is turned off and provide instructions for how to accomplish this.
- For security reasons, you will be asked to remove your watch, remove any listening devices (other than hearing aids), and check your pockets on high stakes exams.
- Once all the security checks and mobile placements have been completed, the proctor generates the exam links and provides them to you in the chat.
- Click on the exam to initiate the connectivity check.
- Begin your exam by clicking the **“I am ready to begin”** button.



Operating System Requirements

Several systems work together to deliver OneStream's certification exams. It is essential that you test requirements of each system PRIOR to your scheduled reservation to avoid issues on test day

- You will need TWO cameras for your exam. One on your laptop and one on your mobile device.
 - Download Google Meet for FREE on your mobile device.
- Verify your sound, camera, and microphone all function in both sample meetings
 - Use a supported browser: Chrome, Firefox, or Edge (**NOTE:** Safari and Internet Explorer are unsupported)
 - Turn off your popup blocker
- Verify you can complete this [5-question quiz](#) **PRIOR** to exam day
 - You must verify your computer and testing location both meet the minimum requirements. Perform these verification steps EARLY and from the same PRIVATE location and room where you will take your exam, using the SAME computer you will use when you take your exam.
- All background applications and processes must be disabled, as they could interfere with exam performance
- For best results, do NOT test on a work computer or Chromebook; there may be security configurations on your work computer that could affect exam performance
 - It is common for companies to setup VPN and network filters that will interfere with your exam. Your IT department can add settings to allow your exam to function properly, but it may take a few days. If a candidate is unable to test due to interference with background applications and processes, the **exam appointment and fee will be forfeited, and the candidate will need to reschedule their exam and pay a retake fee**
 - If you experience issues using a company computer or sitting at work, ask your IT department to following the instructions in [this guide](#), which may resolve the issues

OneStream Certification Team

For questions, submit a case form to the Certification team via the [ServiceNow Support Portal](#)

