

# 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](#)*



# Exam Registration Overview

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# Login to CM Connect

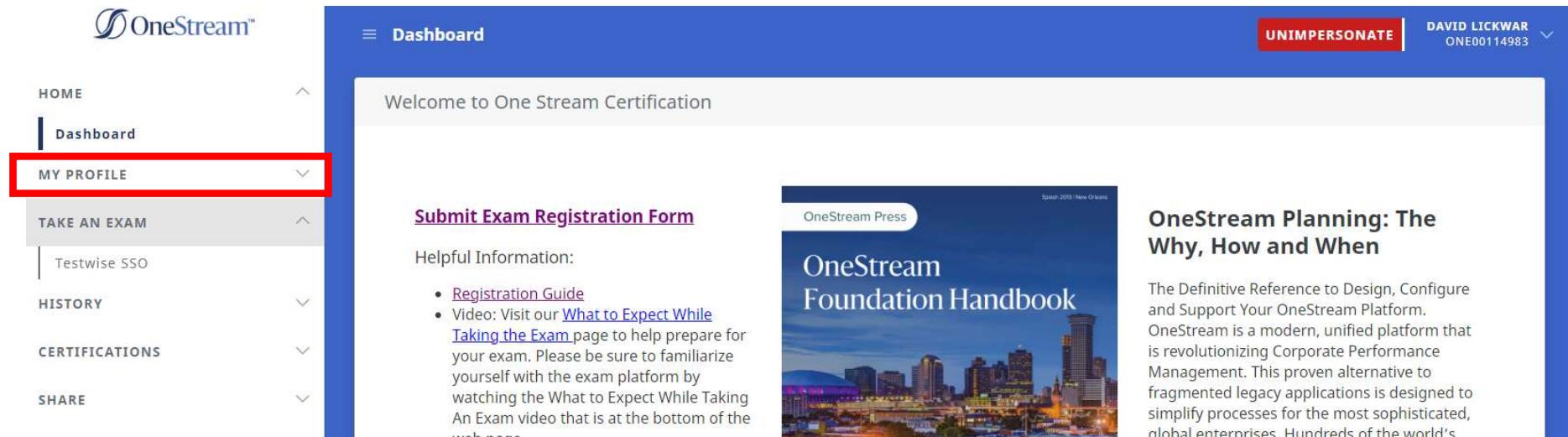
- Click on CM Connect (formerly CertMetrics) in your OneStream Portal



- 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 shows the OneStream CM Connect Dashboard. The left sidebar has a blue header with the OneStream logo and a navigation menu with the following items: HOME (selected), 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 the text "Dashboard" and "Welcome to One Stream Certification". Below this, there is a "Submit Exam Registration Form" button and a "Helpful Information" section with a bulleted list. To the right, there is a book cover for "OneStream Foundation Handbook" and a section titled "OneStream Planning: The Why, How and When" with a descriptive text.

Dashboard

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.

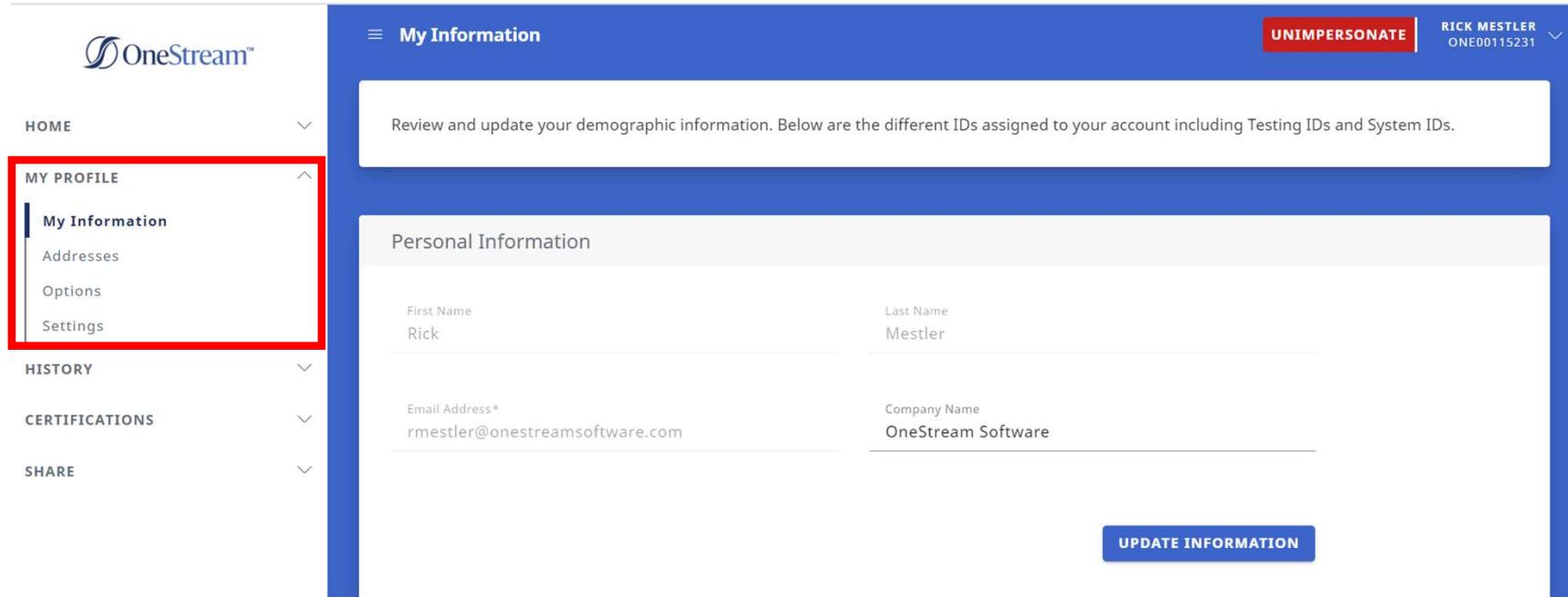
OneStream Press

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

# Confirm Your CM Connect Profile



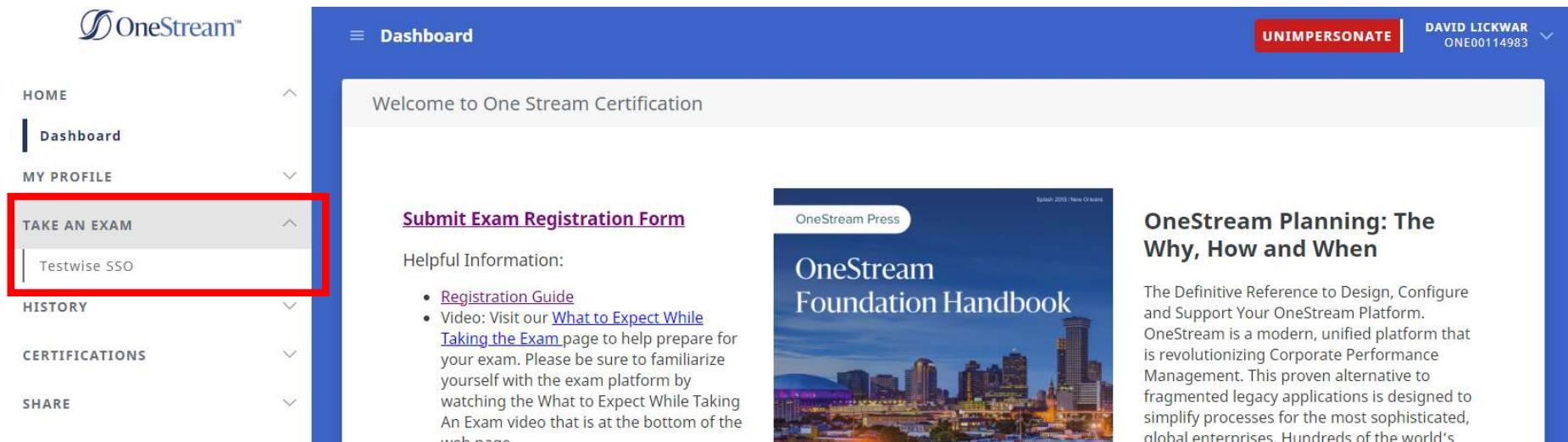
The screenshot shows the 'My Information' page of the OneStream CM Connect profile. The left sidebar has a red box around the 'MY PROFILE' section, which contains 'My Information' (selected), 'Addresses', 'Options', and 'Settings'. The main content area is titled 'My Information' and contains a message: 'Review and update your demographic information. Below are the different IDs assigned to your account including Testing IDs and System IDs.' Below this is a 'Personal Information' section with fields: First Name (Rick), Last Name (Mestler), Email Address\* (rmestler@onestreamsoftware.com), and Company Name (OneStream Software). A blue 'UPDATE INFORMATION' button is at the bottom right.

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 shows the OneStream CM Connect homepage. On the left, a sidebar menu is visible with the following items: HOME (selected), Dashboard, MY PROFILE, TAKE AN EXAM (highlighted with a red box), HISTORY, CERTIFICATIONS, and SHARE. The TAKE AN EXAM item has a sub-item: Testwise SSO. The main content area is titled "Dashboard" and displays a "Welcome to One Stream Certification" message. Below this, there is a section titled "Submit Exam Registration Form" with a link. A "Helpful Information:" section contains a bulleted list: "Registration Guide" and "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". To the right, there is a thumbnail for the "OneStream Foundation Handbook" and a section titled "OneStream Planning: The Why, How and When" with a descriptive text about the handbook.

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

Splash 2013: New Orleans

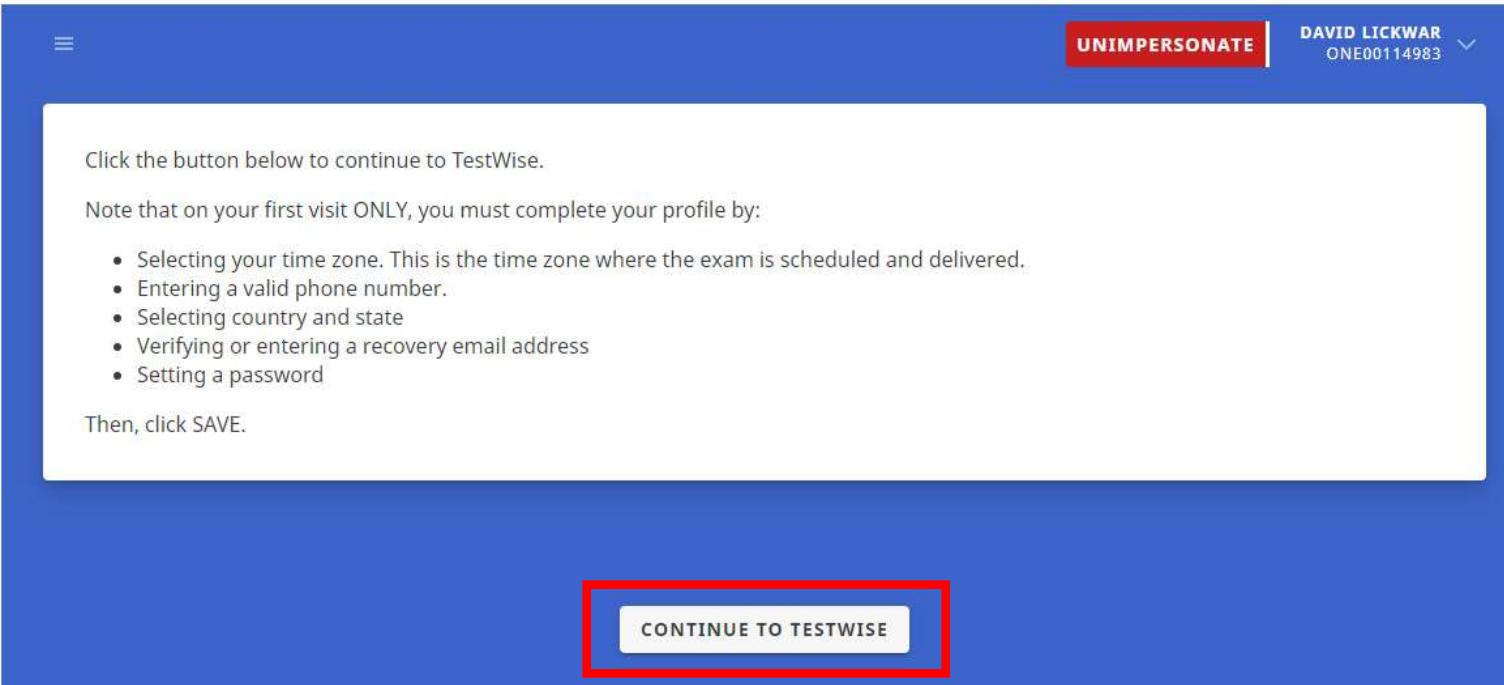
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# Register for an Exam

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



The screenshot shows the OneStream software interface. On the left, there is a vertical navigation menu with the following items: HOME, MY PROFILE, TAKE AN EXAM, Testwise SSO (which is highlighted with a blue background), HISTORY, CERTIFICATIONS, and SHARE. On the right, there is a blue header bar with the OneStream logo, the text "UNIMPERSONATE", and a user profile for "DAVID LICKWAR ONE00114983". Below the header, a central panel 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:

- 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.

At the bottom of the central panel, there is a blue button with the text "CONTINUE TO TESTWISE" inside a red rectangular box.

# 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**

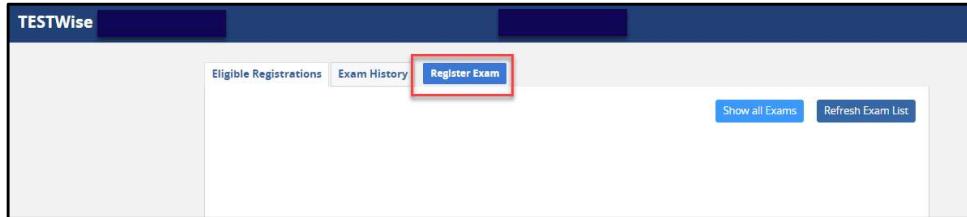
The screenshot shows the 'Edit Profile' page with two tabs: 'Candidate Profile' and 'Payment Profile'. The 'Candidate Profile' tab is active. The page contains several input fields with red boxes highlighting specific fields:

- Country: United States of America
- Time Zone: (UTC-05:00) Eastern Time (US & Canada)
- State\*
- Recovery Email Address\*
- Set Password

At the bottom are 'Save Profile' and 'Cancel' buttons. A navigation bar at the top right includes 'Name', 'Logout', and a red-bordered 'Profile' button.

# Schedule an Exam

- 1 Click Register Exam to schedule your exam

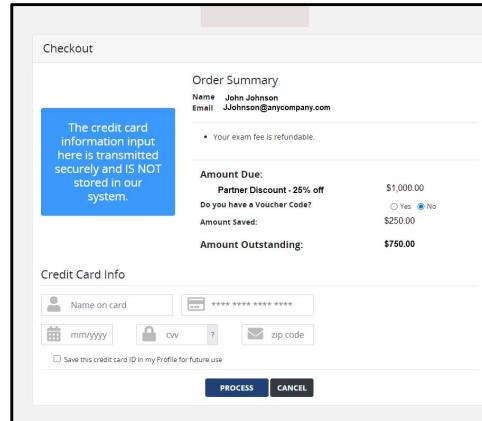


- 2 Click the “Register” button that corresponds to the desired exam



- 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

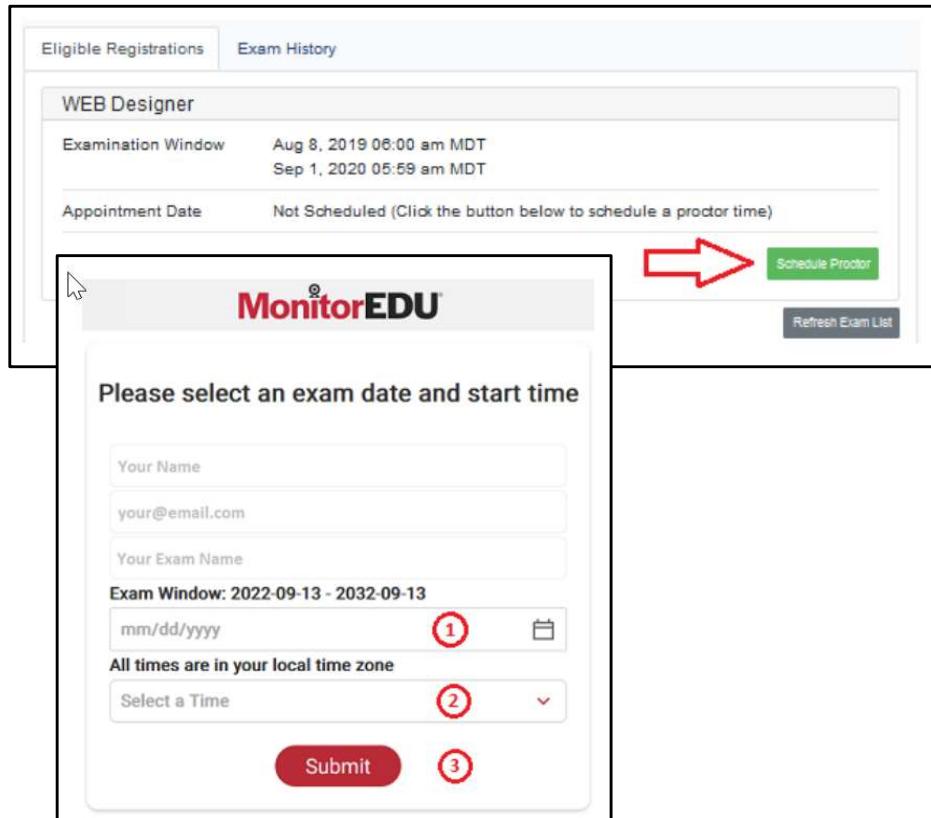


# Schedule an Exam

- 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.

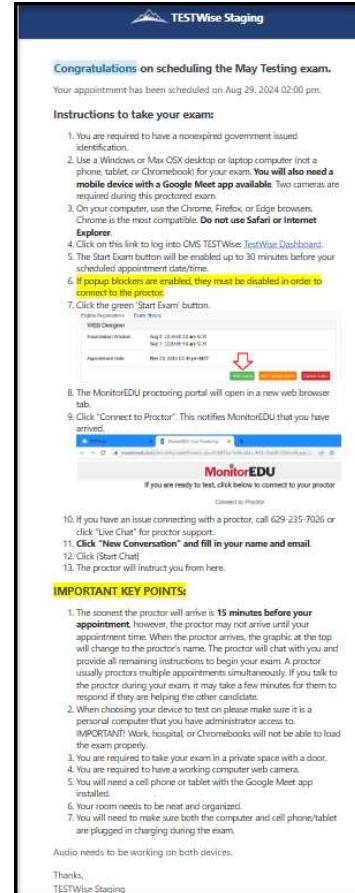
  

- **NOTE:** The TESTWise screen will automatically update to show your scheduled appointment date. If not, click “**Refresh Exam List**”.



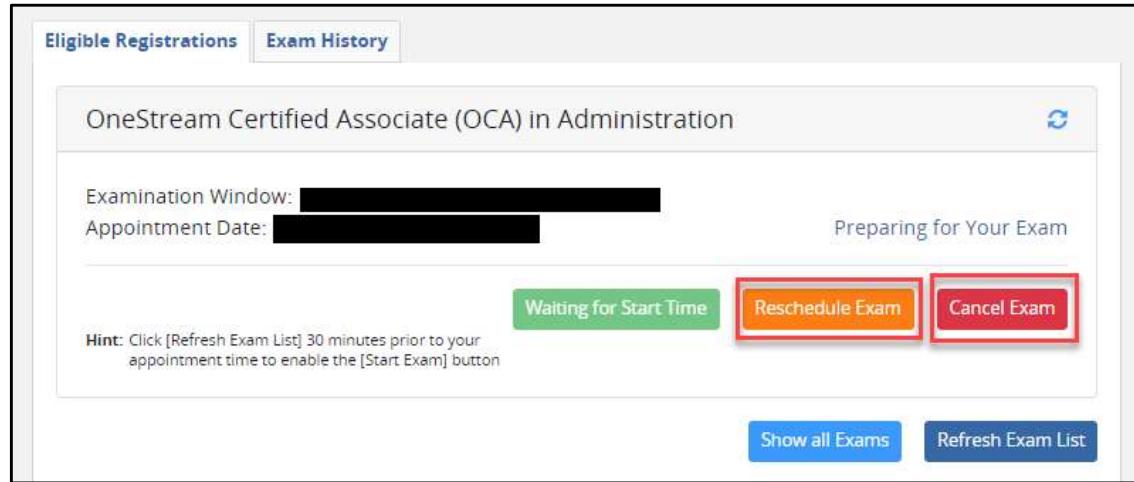
# Confirming of your Appointment

- 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.

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:

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- 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

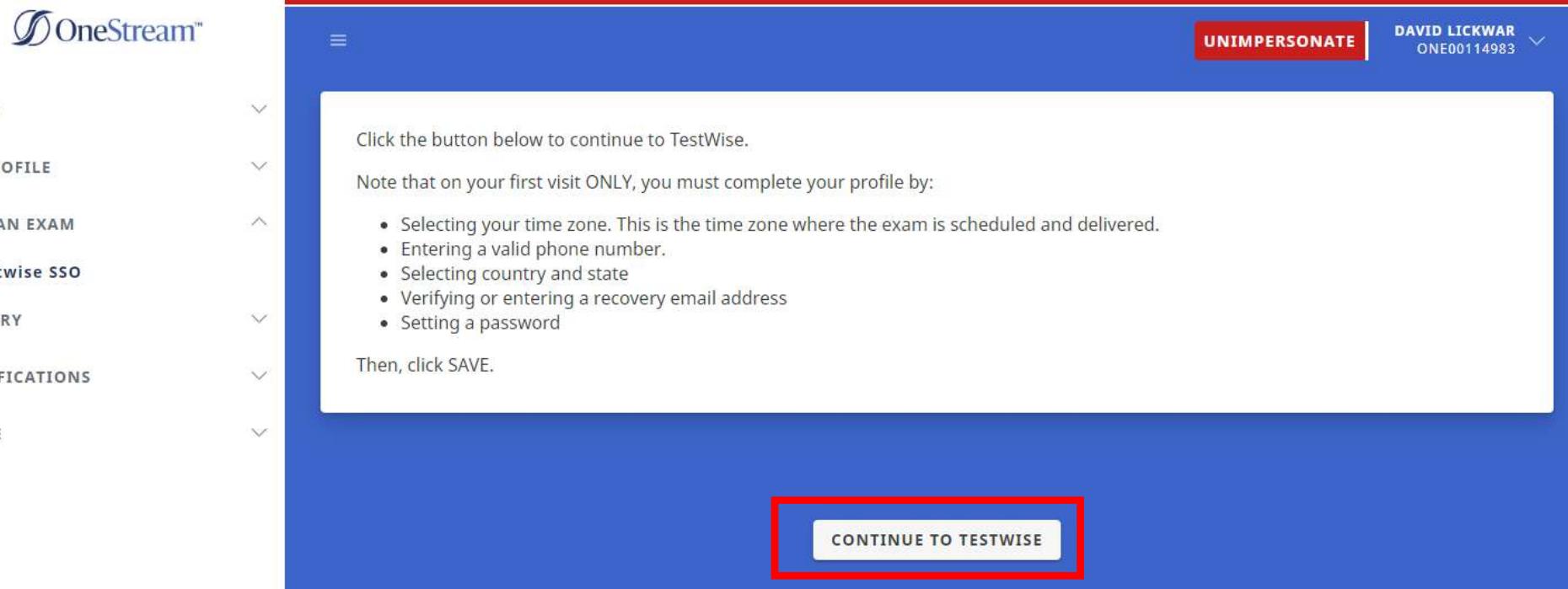
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# On Exam Day

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



The image shows the OneStream software interface. On the left is a sidebar with the following menu items: HOME, MY PROFILE, TAKE AN EXAM, Testwise SSO (which is currently selected and highlighted in blue), HISTORY, CERTIFICATIONS, and SHARE. The main content area has a blue header with the OneStream logo and a red button labeled "UNIMPERSONATE". To the right of the button is the user's name, "DAVID LICKWAR", and a small dropdown arrow. The main content 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:

- 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.

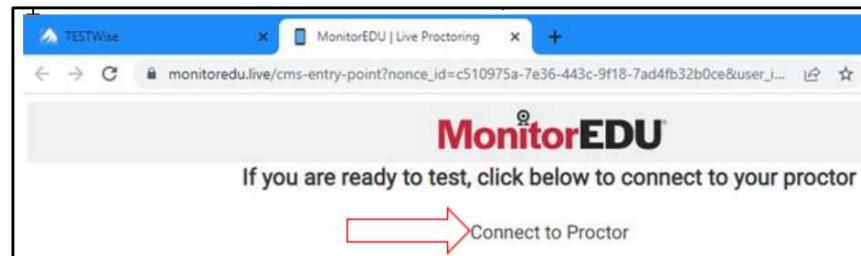
A red box highlights the "CONTINUE TO TESTWISE" button at the bottom of the content box.

# On Exam Day

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



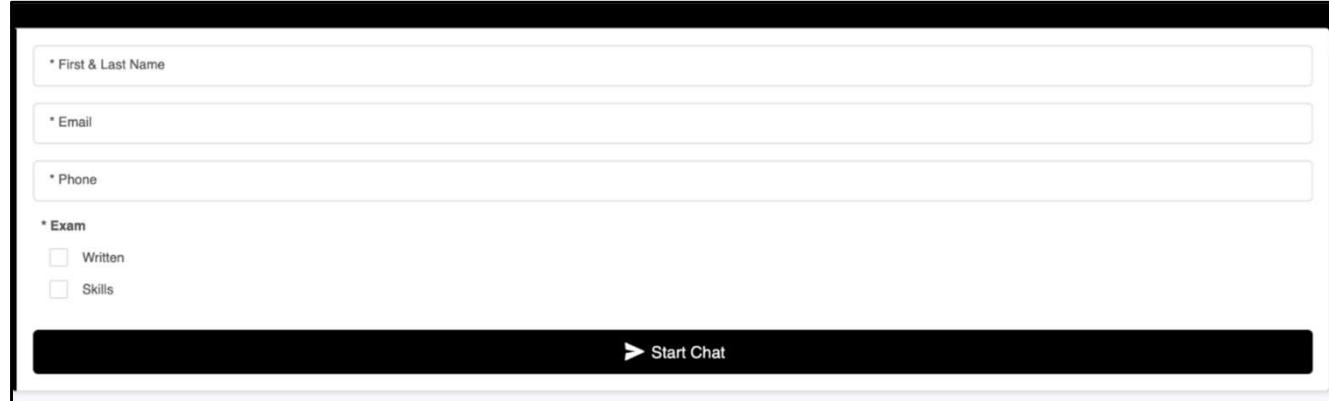
- The MonitorEDU proctoring portal will open in a new web browser tab.
- Click **“Connect to Proctor”**. This notifies MonitorEDU that you have arrived.



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.



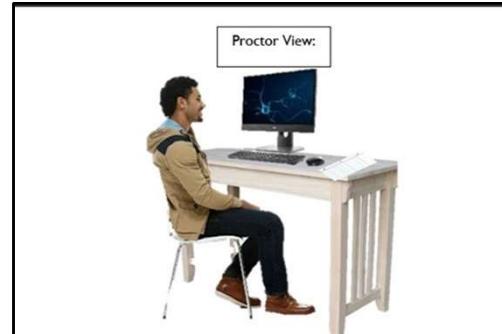
The form consists of the following fields:

- \* First & Last Name
- \* Email
- \* Phone
- \* Exam
  - Written
  - Skills

At the bottom is a large black button with the text "► Start Chat" in white.

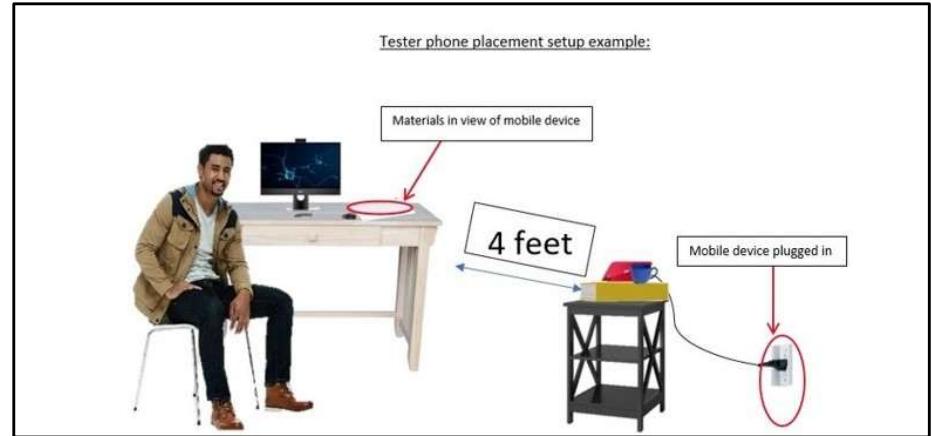
# Using Your Mobile Device for Proctoring

- 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](http://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](#)

