OS-101: OneStream Certified Associate (OCA) - Implementation Foundations Exam

Exam Study Guide v1.4

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Exam Description

Candidates can validate their technical knowledge and competency by successfully passing the OneStream Certified Associate (OCA) - Implementation Foundations exam, based on their specific area of expertise on OneStream 7.3. 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 hybrid exam is a combination of traditional multiple-choice items and hands-on, performance-based situations.

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

- OneStream Platform Overview
- Metadata
- Application Design
- Data Collection and Workflow
- Reporting and Cube Views Overview
- Spreadsheet and Excel Add-in

Recommended Experience

- Formal OneStream training (OneStream Essentials) is highly recommended
- Implementation experience with OneStream is helpful but not essential
- Has some experience/knowledge in areas of Accounting/Finance and/or Information Technology
- General understanding of CPM principles

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 webcams 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. Government-issued IDs. You will need to show these to the proctor via webcam during authentication.

2. Computer or laptop.

3. PC or Mac connected to a power source.
   a. You must be allowed to download software to this computer.
   b. You must have a strong internet connection. We recommend a wired internet connection with a minimum of 5 Mbps download speed and 3 Mbps upload speed.

You must take these important steps to be sure that your computer or laptop are ready:

1. Use a supported browser: Chrome, Firefox, or Edge. (NOTE: Safari and Internet Explorer are unsupported.)

2. Verify you can complete this **5-question quiz** PRIOR to exam day.

3. 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.).
   a. 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.

4. 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.
   a. 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.

5. Verify your sound, camera, and microphone all function.

6. Webcams
   a. It must be portable enough to scan the room. Your proctor will require a visual inspection of your workplace.

7. In addition to your computer, you must have a cell phone or tablet (for proctoring purposes ONLY).
   a. 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.

8. Familiarize yourself with the proctor experience by reviewing the instructions in the **registration guide**.

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Prohibited Equipment

1. Use of cell phones and/or tablets for taking the exam is NOT allowed. They are to be used for proctoring purposes ONLY.

2. You must remove your smart watch, any listening devices (other than hearing aids), and check your pockets.

Dual monitors are NOT allowed for OneStream Certification Exams. However, due to the small size of laptop screens, external monitors are permitted if the laptop stays CLOSED. Two webcams are still required, so candidates must provide their own external webcams for the remote video proctored exam session to allow the proctor a full view of the candidate, and the candidate's surroundings, including the desktop.

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Study References

OneStream Training

Recommended Courses

- OneStream Essentials: Getting Started with OneStream
- OneStream Essentials: Building Basic Reports
- OneStream Essentials: Implementing OneStream
- OneStream Essentials: Configuring Core Application Security

To learn about current training opportunities, please submit a case form to the Training team via the **ServiceNow Support Portal**.

Documentation

- OneStream Design and Reference Guide

OneStream Websites

- **OneStream Training Website**
- **OneStream Certification Program Website**

Exam Objectives

The following tables list the OneStream Certified Associate (OCA) Implementation Foundations 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: OneStream Platform Overview (Weighting: 12%)

Exam Objectives	Applicable Course Content

• **101.1.1:** Define the key functionalities of the OneStream platform	• **Course:** OneStream Essentials - Getting Started with OneStream
	   • **Sections:** High-Level Overview of the Platform, Why OneStream, Business Process 2: FP&A, Business Process 3: Operational Analytics
	• **Course:** OneStream Essentials - Implementing OneStream
	   • **Section:** Cubes and Extensibility

• **101.1.2:** Recognize the different roles of a OneStream user	• **Course:** OneStream Essentials - Getting Started with OneStream • **Section:** Business Processes within OneStream
• **101.1.3:** Differentiate between the different areas of OneStream's navigation pane	• **Course:** OneStream Essentials - Getting Started with OneStream • **Section:** Navigating OneStream

• **101.1.4:** Identify a cube and a cube POV	• **Course:** OneStream Essentials - Getting Started with OneStream
	   • **Sections:** Introduction to Cubes, Cube Point of View
	• **Course:** OneStream Essentials - Implementing OneStream
	   • **Sections:** Cubes and Extensibility

• **101.1.5:** Given a situation, navigate within the OneStream platform (performance test)	• **Course:** OneStream Essentials - Getting Started with OneStream • **Section:** In the OneStream Product

Exam Section 2: Metadata (Weighting: 23%)

Exam Objectives	Applicable Course Content

• **101.2.1:** Recognize the different types of dimensions	• **Course:** OneStream Essentials - Getting Started with OneStream
	   • **Sections:** Introduction to Dimensions, Configurable Dimensions, System Defined Dimensions
	• **Course:** OneStream Essentials - Implementing OneStream
	   • **Sections:** Adding Dimensions
	• **Documentation:** OneStream Design and Reference Guide, Chapter "Cubes"

• **101.2.2:** Recognize the process for using the Excel Metadata Builder to configure dimensions	• **Course:** OneStream Essentials - Getting Started with OneStream • **Section:** Adding Information through the Metadata Builder

• **101.2.3:** Identify the steps to load XML files into OneStream	• **Course: OneStream Essentials** - Getting Started with OneStream
	   • **Section:** Building Dimensions and Members
	• **Course:** OneStream Essentials - Implementing OneStream
	   • **Sections:** Adding Dimensions
	• **Documentation:** OneStream Design and Reference Guide, Chapter "System Security Roles"

• **101.2.4:** Identify how to configure properties using the grid view	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Adding Dimensions • **Documentation:** OneStream Design and Reference Guide, Chapter "Cubes"
• **101.2.5:** Identify the security settings available on dimension members	• **Course:** OneStream Essentials: Configuring Core Application Security • **Section:** Applying Security
• **101.2.6:** Given a situation, add a FX rate (performance test)	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Cubes & Extensibility
• **101.2.7:** Given a situation, build dimensions and members (performance test)	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Adding Dimensions

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Exam Section 3: Application Design (Weighting: 15%)

Exam Objectives	Applicable Course Content
• **101.3.1:** Identify the dimension types that make up the level 1 data unit	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Cubes and Extensibility
• **101.3.2:** Recognize how to set up cube properties and cube dimensions	• **Course:** OneStream Essentials - Implementing OneStream • **Sections:** Cubes and Extensibility; Workflow Start • **Documentation:** OneStream Design and Reference Guide, Chapter "Cubes"
• **101.3.3:** Differentiate horizontal from vertical extensibility	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Cubes and Extensibility

• **101.3.4:** Recognize the difference between dynamic vs stored calculations	• **Course:** OneStream Essentials - Implementing OneStream
	   • **Sections:** Running Calculations in OneStream
	• **Course:** OneStream Essentials - Building Basic Reports
	   • **Section:** Building Calculations

• **101.3.5:** Given a situation, define the application properties (performance test)	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** OneStream Project; Adding Dimensions

Exam Section 4: Data Collection and Workflow (Weighting: 22%)

Exam Objectives	Applicable Course Content
• **101.4.1:** Distinguish between the different data source types	• **Course:** OneStream Essentials - Implementing OneStream • **Sections:** Importing Data
• **101.4.2:** Differentiate between the different transformation rule types	• **Course:** OneStream Essentials - Implementing OneStream • **Sections:** Importing Data

• **101.4.3:** Identify the steps of a workflow	• **Course:** OneStream Essentials - Getting Started with OneStream
	   • **Section:** Workflow Overview
	• **Course:** OneStream Essentials - Implementing OneStream
	   • **Sections:** Workflow Start

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Exam Objectives	Applicable Course Content
• **101.4.4:** Identify the steps to configure workflow properties through the grid view	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Workflow Design • **Documentation:** OneStream Design and Reference Guide, Chapter "Workflow Profile Grid View"
• **101.4.5:** Identify action and frequency of confirmation rules	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Completing the Workflow
• **101.4.6:** Identify potential uses for certification questions	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Completing the Workflow
• **101.4.7:** Recognize how to enter and adjust data using forms	• **Course:** OneStream Essentials - Implementing OneStream • **Sections:** Data Entry
• **101.4.8:** Recognize how to enter and adjust data using journals	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Data Entry • **Documentation:** OneStream Design and Reference Guide, Chapter "Workflow"
• **101.4.9:** Given a situation, build out a simple workflow hierarchy (performance test)	• **Course:** OneStream Essentials - Implementing OneStream • **Section:** Workflow Design

Exam Section 5: Reporting and Cube Views Overview (Weighting: 19%)

Exam Objectives	Applicable Course Content

• **101.5.1:** Differentiate between the different reporting options and their use cases	• **Course:** OneStream Essentials - Getting Started with OneStream
	  • **Section:** Reporting Options in OneStream
	• **Course:** OneStream Essentials - Building Basic Reports
	  • **Sections:** Connecting Reports to Application Design, Reporting and OneStream, Reporting and OneStream, Introduction to Formatting
	• **Documentation:** OneStream Design and Reference Guide, Chapters "Presenting Data with Books, Cube Views and Dashboards", "Build Reports through Cube Views"

• **101.5.2:** Identify how reports connect to application design	• **Course:** OneStream Essentials - Building Basic Reports • **Section:** Connecting Reports to Application Design

Exam Objectives	Applicable Course Content
• **101.5.3:** Define the types of parameters created in the Dashboard Maintenance Unit	• **Course:** OneStream Essentials - Building Basic Reports • **Sections:** Parameters Overview, Parameter Types
• **101.5.4:** Recognize the order of overrides in cube view formatting	• **Course:** OneStream Essentials - Building Basic Reports • **Section:** Applying Overrides

• **101.5.5:** Recall how to build calculations in a cube view	• **Course:** OneStream Essentials – Implementing OneStream
	    • **Section:** Running Calculations in OneStream
	• **Course:** OneStream Essentials - Building Basic Reports
	    • **Section:** Building Calculations

• **101.5.6:** Recognize when to apply suppression settings	• **Course:** OneStream Essentials - Building Basic Reports • **Section:** Cube View Performance • **Documentation:** OneStream Design and Reference Guide, Chapter "Quick Views"
• **101.5.7:** Outline the member expansions, functions, and variables in the Member Filter Builder	• **Course:** OneStream Essentials - Building Basic Reports • **Section:** Using the Member Filter Builder

• **101.5.8:** Recognize the different security options for cube views	• **Course:** OneStream Essentials - Getting Started with OneStream
	    • **Section:** Build a Cube View
	• **Course:** OneStream Essentials: Configuring Core Application Security
	    • **Sections:** Object Security, Cube Security

• **101.5.9:** Given a situation, edit an existing cube view (performance test)	• **Course:** OneStream Essentials – Implementing OneStream • **Section:** Cubes & Extensibility

Exam Section 6: Spreadsheet and Excel Add-in (Weighting: 9%)

Exam Objectives	Applicable Course Content

• **101.6.1:** Define a quick view	• **Course:** OneStream Essentials - Getting Started with OneStream
	    • **Section:** Working with the Excel Add-In/Spreadsheet Tool
	• **Course:** OneStream Essentials - Building Basic Reports
	    • **Section:** Quick Views

Exam Objectives	Applicable Course Content

• **101.6.2:** Recall the steps for configuring and formatting a cube view connection	• **Course:** OneStream Essentials – Implementing OneStream
	  • **Section:** Data Entry
	• **Course:** OneStream Essentials - Building Basic Reports
	  • **Section:** Cube Views in Spreadsheet

• **101.6.3:** Identify the steps for working with OneStream XF functions	• **Course:** OneStream Essentials – Implementing OneStream • **Section:** Data Entry • **Documentation:** OneStream Design and Reference Guide, Chapters "Retrieve Functions", "Application Tools"
• **101.6.4:** Given a situation, update preferences, create a quick view, and amend options (performance test)	• **Course:** OneStream Essentials – Building Basic Reports • **Section:** Ad Hoc Reporting Through Spreadsheet/Excel Add-In

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 multiple-choice 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.   **Which two (2) dimension types are configurable? Select two.**

    A.   Origin
    B.   View
    C.   Parent
    D.   Entity

2.   **Which type of file should a consultant use to import metadata via the load/extract button?**

    A.   .csv
    B.   .xml
    C.   .xlsx
    D.   .png

3.   **Which dimension type has more security properties than other dimension types?**

    A.   Account
    B.   Entity
    C.   UD1
    D.   Scenario

4.   **Which two (2) dimension types are part of the level 1 data unit? Select two.**

    A.   Parent
    B.   Account
    C.   Consolidation
    D.   Flow

5.   **A consultant is using rules to seed data that will be used in an application with multiple currencies.**

    Which cube setting should the consultant set to True to enable this functionality?

    A.   Cube Properties | Calculation | Calculate Share Cons if No Data
    B.   Cube Properties | Calculation | Consolidation Algorithm Type | Custom
    C.   Cube Properties | Calculation | Calculate Local Currency if No Data

6. **Which transformation rule type has the highest processing cost?**

      A.   One-to-One
      B.   Range
      C.   Derivative
      D.   Composite

* Answer key and rationales provided on next page

Sample Exam Question Answers

1. C & D, (Both A and B are system defined dimension types and not editable.)
2. B, (A is a read-only Excel file and cannot be read by OneStream, C is an editable Excel file and cannot be read by OneStream, and D is a graphics file and cannot be imported to OneStream via the load/extract button.)
3. B, (A and C only have the Display Member Group property, D has properties to control read and write of data but does not have the Display Member Group property.)
4. A & C, (B and D are not part of the level 1 data unit.)
5. C, (A impacts the C#Share member and is typically set to false if share data from partial ownerships is not required. Setting it to True will not accommodate common seeding situations. D has to do with the calculation algorithm function and does not deal with data situations.)
6. C, (A, B, and D have lower processing costs.)

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