OS-201: OneStream Certified Professional (OCP) Core Platform Architect Exam

Exam Study Guide v1.0

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Exam Description

Candidates can validate their technical knowledge and competency by becoming a OneStream Certified Professional Core Platform Architect based on their specific area of expertise on OneStream 8.x. 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 exam is comprised of both traditional multiple-choice items and performance-based items.

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

- Consolidation/Planning Concepts
- Data Integration
- Workspaces
- Security
- Rules and Assemblies
- Workflow
- Metadata and Dimensionality
- Data Management

Recommended Experience

- 2-3 years in the Implementation and Architect fields.
- 2-3 years working with OneStream software.
- Has experience/knowledge in areas of Accounting/Finance and/or Information Technology.

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.

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What to Expect While Taking an Exam

The exam will be online and remotely proctored through video.

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

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.

There are several systems that work together to deliver OneStream Software exams. It is essential for you to test the requirements of each system prior to your scheduled reservation to avoid issues on test day.

Take these important steps to be sure that you will be able to take your test:

- You will need TWO cameras for your exam: 0ne 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 set up 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.

Prohibited Equipment

- Use of cell phones and/or tablets for taking the exam is NOT allowed. They are to be used for proctoring purposes ONLY.
- You must remove your smart watch, any listening devices (other than hearing aids), and check your pockets.

Note: 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.

Study References

OneStream Training

Recommended Courses

- OneStream Essentials: Getting Started with OneStream
- OneStream Essentials: Building Basic Reports
- OneStream Essentials: Implementing OneStream
- OneStream Architecture; Designing an Application
- OneStream Essentials: Configuring Core Application Security
- OneStream Essentials: OneStream Administration
- OneStream Architecture: Design Decisions Instructor Led

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

Press Books

- OneStream Foundation Handbook
- OneStream Financial Rules and Calculations
- OneStream Planning: The Why, How and When

Documentation

- OneStream Design and Reference Guide

OneStream Websites

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

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Exam Objectives

The following tables list the OneStream Certified Professional (OCP) Core Platform Architect 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: Cube (Weighting: 15%)

Exam Objectives	Applicable Course Content

• **201.1.1:** Given a design specification, apply changes to cube settings	• **Course:** Getting Started with OneStream
	  • **Lesson:** Introducing to Reporting
	• **Documentation:** OneStream Design and Reference Guide
	  • **Section:** Cubes; Cube Properties

• **201.1.2:** Given a long running calculation for an entity, analyze data unit statistics to determine a root cause	• **Course:** OneStream Architecture; Designing an Application
	  • **Lesson:** Tuning the OneStream Infrastructure
	• **Press Book:** OneStream Foundation Handbook
	  • **Chapters:** Design And Build
	• **Documentation:** OneStream Design and Reference Guide
	  • **Sections:** OnePlace Cube Views, Standard Cube View Design and Other Items; Workspaces; Financial Model

• **201.1.3:** Demonstrate how to set and apply FX Rates	• **Documentation:** OneStream Design and Reference Guide • **Section:** Cubes
• **201.1.4:** Demonstrate understanding of dimension member settings.	• **Documentation:** OneStream Design and Reference Guide • **Section:** Cubes
• **201.1.5:** Demonstrate an understanding of stored and dynamic calculations.	• **Documentation:** OneStream Design and Reference Guide • **Section:** Formula Guide

Exam Section 2: Workflow (Weighting: 14%)

Exam Objectives	Applicable Course Content
• **201.2.1:** Apply the appropriate workflow name for a given situation	• **Documentation:** OneStream Design and Reference Guide • **Section:** Workflow; OnePlace Workflow
• **201.2.2:** Apply a calculation/consolidation on the workflow	• **Documentation:** OneStream Design and Reference Guide • **Section:** Workflow

Exam Objectives	Applicable Course Content

• **201.2.3:** Demonstrate an understanding of workflow profile settings	• **Documentation:** OneStream Design and Reference Guide
	  • **Sections:** Workflow
	• **Documentation:** Platform Guides
	  • **Sections:** Designing BI Blend

• **201.2.4:** Discuss the primary purpose of several less used workflow settings	• **Documentation:** OneStream Design and Reference Guide
	  • **Sections:** Workflow
	• **Documentation:** Platform Guides
	  • **Sections:** Designing BI Blend

Exam Section 3: Data Collection (Weighting: 13%)

Exam Objectives	Applicable Course Content

• **201.3.1:** Demonstrate an understanding of the different data source types	• **Press Book:** OneStream Foundation Handbook
	  • **Chapter:** Data Integration
	• **Documentation:** OneStream Design and Reference Guide
	  • **Sections:** Data Sources; Business Rules

• **201.3.2:** Given source data requirements, apply an XFD data source configuration	• **Documentation:** OneStream Design and Reference Guide • **Section:** Data Collection; About Collection Data
• **201.3.3:** Demonstrate an understanding of the Import Process Log	• **Documentation:** OneStream Design and Reference Guide • **Section:** OnePlace Workflow

• **201.3.4:** Given a situation, describe Transformation Rule types, names, and examples that perform most efficiently	• **Press Book:** OneStream Foundation Handbook
	  • **Chapter:** Data Integration
	• **Documentation:** OneStream Design and Reference Guide
	  • **Section:** Data Collection; Transformation Rules

Exam Section 4: Presentation (Weighting: 14%)

Exam Objectives	Applicable Course Content

• **201.4.1:** Demonstrate an understanding of cube view configurations	• **Course:** OneStream Essentials: Building Basic Reports
	  • **Lesson:** Building a Simple Cube View
	• **Documentation:** OneStream Design and Reference Guide
	  • **Sections:** Cubes; Using OnePlace Workflow; Parameter Guides; Presenting Data with Books, Cube Views, and Dashboard

Exam Objectives	Applicable Course Content
• **201.4.2:** Demonstrate an understanding of the scope of workspaces.	• **Documentation:** OneStream Design and Reference Guide • **Sections:** Presenting Data with Books, Cube Views, and Dashboard; Workflow
• **201.4.3:** Describe the steps to create a report book.	• **Documentation:** OneStream Design and Reference Guide • **Sections:** Presenting Data with Books, Cube Views, and Dashboard

Exam Section 5: Tools (Weighting: 9%)

Exam Objectives	Applicable Course Content
• **201.5.1:** Demonstrate understanding of the different types of Data Management steps and their appropriate use cases	• **Documentation:** OneStream Design and Reference Guide • **Section:** Application Tools

• **201.5.2:** Demonstrate understanding of the Excel Add-in functionality	• **Documentation:** OneStream Design and Reference Guide
	  • **Section:** About Excel Add-In
	• **Documentation:** OneStream Platform Guide
	  • **Section:** Table Views

• **201.5.3:** Demonstrate an understanding of Application Properties (global, Currency, etc.)	• **Documentation:** OneStream Design and Reference Guide • **Sections:** Application Tools
• **201.5.4:** Demonstrate how to create a scheduled task	• **Documentation:** OneStream Design and Reference Guide • **Sections:** Application Tools
• **201.5.5:** Demonstrate an understanding of the proper use of load/extract	• **Documentation:** OneStream Design and Reference Guide • **Sections:** System Tools; Application Tools
• **201.5.6:** Demonstrate an understanding of the difference between application and system load/extract tools	• **Documentation:** OneStream Design and Reference Guide • **Sections:** Application Tools

Exam Section 6: Security (Weighting: 10%)

Exam Objectives	Applicable Course Content

• **201.6.1:** Demonstrate an understanding of data cell access	• **Course:** OneStream Essentials: Configuring Core Application Security
	  ◦ **Lesson:** Slice Security
	• **Documentation:** OneStream Design and Reference Guide
	  ◦ **Sections:** Cubes

• **201.6.2:** Describe the characteristics of application security roles, application user interface roles, and system security roles	• **Documentation:** OneStream Design and Reference Guide ◦ **Sections:** Application Tools; Foreign Exchange Rates; Manage System Security
• **201.6.3:** Demonstrate the ability to troubleshoot security access	• **Documentation:** OneStream Design and Reference Guide ◦ **Sections:** Cubes; Manage System Security; Application Security Roles; Relationship Security

Exam Section 7: Administration (Weighting: 9%)

Exam Objectives	Applicable Course Content
• **201.7.1:** Demonstrate an understanding of the items available on the system tab	• **Documentation:** OneStream Design and Reference Guide ◦ **Sections:** Logging; System Tools

• **201.7.2:** Demonstrate troubleshooting abilities to solve issues	• **Course:** OneStream Architecture; Designing an Application
	  ◦ **Lesson:** Cube Properties; Application Tools
	• **Documentation:** OneStream Design and Reference Guide
	  ◦ **Sections:** Navigation, Loading Data Via Excel Templates or CSV, OnePlace Workflow; System Tools
	• **Documentation:** OneStream Platform Guide
	  ◦ **Sections:** MarketPlace Solution

Exam Section 8: Rules (Weighting: 16%)

Exam Objectives	Applicable Course Content

• **201.8.1:** Demonstrate an understanding of the proper use case for various business rule types	• **Press Book:** OneStream Foundation Handbook
	  • **Chapter:** Rules and Calculations
	• **Documentation:** OneStream Design and Reference Guide
	  • **Sections:** Business Rules; Presenting Data with Books, Cube Views, and Other Items
	• **Documentation:** OneStream Platform Guide
	  • **Sections:** Table Views Guide

• **201.8.2:** Demonstrate an understanding of the proper use case for various function types	• **Press Book:** OneStream Foundation Handbook
	  • **Chapter:** Rules and Calculations
	• **Documentation:** OneStream Design and Reference Guide
	  • **Sections:** Key Functions; Business Rules

For questions related to the certification process or exam, please open a case with Credentialing via the **ServiceNow Support Portal**.

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Special Thank You to Our Subject Matter Experts

- Ben Holladay-McCann, Finit
- Cindy Eichner, Finit
- Henning Windhagen, OneStream Software
- Lara Sturm, OneStream Software
- Michelle Casey, Finit
- Rich House, OneStream
- Ryann Hristovsky, Black Diamond Advisory
- Sumeet Dwesar, OneStream Software
- Wayne Hulshof, TLC Technologies
- Werner Nindl, Nova Advisory