OneStream® Navigator

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
  - Deactivate and add users.
  - Know where to find the Solution Exchange and recall any Administration or Reporting focused solutions.
  - Add a visual marker to make a distinction between development and production environments.
  - Navigate the ServiceNow portal and locate Knowledge Base articles.
  - Navigate to ONECommunity, understand its purpose, search for posts, and create a post.
- ☑ Manage Dimensions
  - Load and extract a variety of artifacts from an application.
  - Add a new currency.
  - Edit member properties in editable dimensions.
  - Add members manually and by using XML load files.
- ☑ Work with Cubes and Extensibility
  - Recall the concept of the Level 1 Data Unit.
  - Recall how a cube is configured.
  - Comprehend how vertical and horizontal extensibility can be applied to dimensions and cubes.
- ☑ Building and update the Workflow
  - Recognize the benefits of workflows and when to use a Cube Root Workflow Profile.
  - Recall what Workflow Templates are.
  - Recall the different Workflow Input Types and when to use them.
  - Create a Central Input Workflow Profile.
- ☑ Manage and maintain data import artifacts
  - Create a Data Source.
  - Set up, create and use Transformation Rules, Groups, and Profiles.
  - Import data using a delimited file.

Agenda

The following topics will be covered:

- ☑ Introduction to the Administrator Role
- ☑ Application Properties and Dimensions
- ☑ Working with Cubes & Extensibility
- ☑ Building a Workflow
- ☑ Importing Data into OneStream
- ☑ Setting up OneStream for Data Entry
- ☑ Finalizing the application changes

- ☑ Manage and maintain data entry workflows and artifacts
    - ▪ Distinguish the ways to get data into OneStream.
    - ▪ Set up a workflow for data entry.
    - ▪ Recall the ways to investigate data.
    - ▪ Use drilldown and cell status/POV for troubleshooting.
- ☑ Revise and update Workflow processes
    - ▪ Identify the different ways to run calculations.
    - ▪ Recall how to run calculations at the Workflow Process step.
    - ▪ Process a workflow by working with Data Management Jobs and Task Scheduler.
    - ▪ Confirm data quality by creating and using Confirmation Rules.
    - ▪ Lock and unlock a workflow.
    - ▪ Recall what Certification Questions are and how to apply Quick Certify to a workflow.
    - ▪ Certify data.
    - ▪ Use right-click functions and the batch workflow functionality.
- ☑ Utilize Administrator tools
    - ▪ Compare metadata with the Dimension Comparison Utility.
    - ▪ Apply key considerations when copying data between environments.
    - ▪ Edit an existing dashboard.
    - ▪ Load the Admin Solution Tools and use it to assign a homepage.

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

This course is offered as self-paced On-Demand.

Questions? Contact the Training Support Team by submitting a case form on the ServiceNow Support Portal.

⟲ OneStream® Global Education Services

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ONESTREAM ADMINISTRATION