

OneStream Current Course Offerings (by Series)

Learners may complete courses in an order of their choosing, assuming course pre-requisites are met. The illustrations below demonstrate a recommended flow of consumption by OneStream Global Education Services.

ONESTREAM ESSENTIALS

Foundational courses typically taken early in your OneStream journey.



Getting Started with OneStream



OneStream Administration



Building Basic Reports



Configuring Core Application Security



Building Basic Dashboards



Implementing OneStream



Level 2: Financial Model Rules

ONESTREAM SPECIALIST

Deeper dive courses exploring common focus areas within OneStream.



Level 2: Financial Planning



Level 3: Dashboards

ONESTREAM MARKETPLACE

Courses tailored to implementation and operation of Marketplace solutions.



Level 2: Specialty Planning



Sensible Machine Learning Foundations



Implementing OFC Account Reconciliations



Implementing OFC Transaction Matching



Integrating and Automating OFC

ONESTREAM ARCHITECTURE

Courses that more deeply explore the implementation and optimal configuration of OneStream.



Level 2: BI Blend



Smart Integration Connector



Designing an Application

LEGEND

COURSE DELIVERY

ILT INSTRUCTOR-LED TRAINING

OD ON-DEMAND COURSE

CS CLASSIC SERIES

ONESTREAM CONTINUED LEARNING



CERTIFICATION



PRESS



ONECOMMUNITY



PODCAST



NAVIGATOR



TECH TALKS



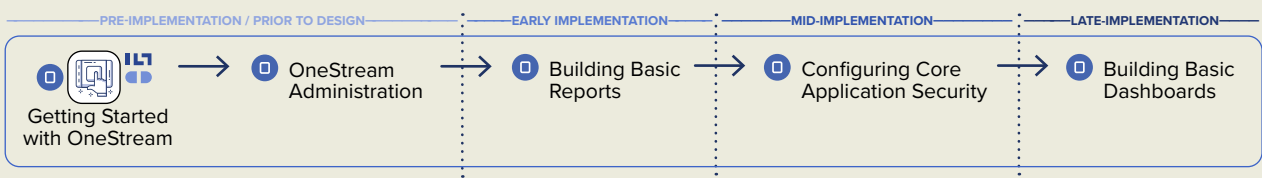
QUICKTIPS

OneStream Recommended Learning Paths

Learners may complete courses in an order of their choosing, assuming course pre-requisites are met. The illustrations below demonstrate a recommended flow of consumption by OneStream Global Education Services.

EXAMPLE LEARNING PATHS BASED ON ROLE

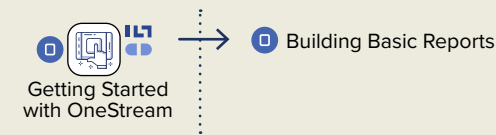
ADMINISTRATOR READINESS



PLANNING ADMINISTRATOR



POWER USER



Associate in Administration Certification Exam

[VIEW THE STUDY GUIDE](#)

Lead Architect Certification Exam

[VIEW THE STUDY GUIDE](#)

Implementation Foundations Certification Exam

[VIEW THE STUDY GUIDE](#)

LEGEND

COURSE DELIVERY

INSTRUCTOR-LED TRAINING

ON-DEMAND COURSE

LEARNING SERIES

ONESTREAM ESSENTIALS

ONESTREAM ARCHITECTURE

ONESTREAM MARKETPLACE



CLASSIC SERIES

ADMINISTRATOR READINESS

OneStream Course Price Chart

ON-DEMAND AND INSTRUCTOR-LED TRAINING
Remote Delivery | Centralized Classroom

Series	Course	Delivery	ILT Duration	Instructor-Led Training (ILT) List Price	OD Duration	On-Demand (OD) List Price
OneStream Essentials	Getting Started with OneStream		N/A	N/A	8–9 Hours	FREE
OneStream Essentials	Implementing OneStream	ILT	5-Day	\$4,800 USD £3,850 GBP €4,450 EUR	24 Hours	\$3,600 USD £2,890 GBP €3,340 EUR
OneStream Essentials	Building Basic Reports	ILT	3-Day	\$2,880 USD £2,310 GBP €2,670 EUR	14–16 Hours	\$2,160 USD £1,730 GBP €2,000 EUR
OneStream Essentials	Configuring Core Application Security		N/A	N/A	2.5 Hours	\$100 USD £80 GBP €90 EUR
OneStream Essentials	Building Basic Dashboards	ILT	2-Day	\$1,920 USD £1,540 GBP €1,780 EUR	N/A	N/A
OneStream Essentials	OneStream Administration		N/A	N/A	12 Hours	\$2,160 USD £1,730 GBP €2,000 EUR
OneStream Essentials	Getting Started + Administration ILT Bundle	ILT	4-Day	\$3,840 USD £3,080 GBP €3,560 EUR	N/A	N/A
Classic Series	Level 2: BI Blend	ILT	2-Day	\$1,920 USD £1,540 GBP €1,780 EUR	N/A	N/A
Classic Series	Level 2: Financial Planning	ILT	3-Day	\$2,880 USD £2,310 GBP €2,670 EUR	N/A	N/A
Classic Series	Level 2: Specialty Planning	ILT	2-Day	\$1,920 USD £1,540 GBP €1,780 EUR	N/A	N/A
Classic Series	Level 2: Financial Model Rules	ILT	2-Day	\$1,920 USD £1,540 GBP €1,780 EUR	N/A	N/A
Classic Series	Level 3: Dashboards	ILT	2-Day	\$1,920 USD £1,540 GBP €1,780 EUR	N/A	N/A
OneStream MarketPlace	Sensible Machine Learning Foundations		N/A	N/A	7 Hours	FREE
OneStream MarketPlace	Implementing OFC Account Reconciliations		N/A	N/A	10 Hours	\$1,200 USD £960 GBP €1,110 EUR
OneStream MarketPlace	Implementing OFC Transaction Matching		N/A	N/A	10 Hours	\$1,200 USD £960 GBP €1,110 EUR
OneStream MarketPlace	Integrating and Automating OFC		N/A	N/A	5 Hours	\$600 USD £480 GBP €560 EUR
OneStream Architecture	Designing an Application		N/A	N/A	16 Hours	\$2,880 USD £2,310 GBP €2,670 EUR
OneStream Architecture	Smart Integration Connector		N/A	N/A	5 Hours	FREE
	Excel Add-In Training for End Users	ILT	1-Day	\$620 USD £500 GBP €580 EUR	N/A	N/A

LEGEND:  Instructor-Led Training (Classroom)  On-Demand Learning (OneStream Navigator)

OneStream Training FAQ

Global Education Services (GES) Frequently Asked Questions (FAQ)

LEARNING PATHS AND COURSES

Who should a customer or partner contact if they have training questions?

All Global Education Services-related inquiries should be submitted using the GES Case form on the [ServiceNow Support Portal](#).

How can I find training classes taught by OneStream Authorized Training Partners?

Visit onestream.com/training/ and scroll to Training Locations to find a OneStream Classroom or an Authorized Training Partner.

Who should go to training?

Project managers, consultants, administrators and business analysts/power users should be trained where possible, before the start of a project. However, the number of users trained depends on the size and complexity of the project.

Depending on company size and implementation, OneStream recommends that at bare minimum one administrator complete a learning path matched to their implementation, starting with the Administrator Readiness Path. Additionally, anyone filling the role of a “report writer” should complete the Power User Learning Path.

A. Small to Medium Projects: OneStream recommends minimum training for 2 people on 3 courses. This includes one administrator following the OneStream Administrator Readiness

Learning Path and a business analyst or power user following the OneStream Power User Learning Path. Where the project includes a OneStream specialty solution such as OneStream Financial Close (OFC), additional training will be required on that specific specialty solution.

B. Medium, Large or Complex Projects: OneStream recommends training for 3 or more people on 3 courses per work stream such as consolidation and planning. This includes functional and advance administrators following the OneStream Administrator Readiness Learning Path and a business analyst or power user following OneStream Power User Learning Path. Additional training and an additional person could be required for specialty solutions.

What training should I take during implementation, and when?

OneStream strongly recommends completing training at various phases throughout implementation: Analyze, Design, Build, Test and Rollout. The most successful projects train key users before the Analyze phase, following A and B above. Administrators should follow the OneStream recommended Administrator Readiness Path, which can be modified to match your implementation needs base on size, complexity and preferences. Customers with a DIY preference can train an advanced

administrator; to achieve this, they can swap the OneStream Administration (OSA) course for the Implementing OneStream (IOS) course. Business analysts or power users should follow the OneStream recommended Power User Learning Path. Customers with large and complex reporting needs are recommended to have a person taking the Building Basic Reports (BBR) course. Projects with simple and moderately complex reporting needs can have their functional administrator take the Getting Started with OneStream (GSWO) and OSA courses.

What training is available to IT professionals responsible for some aspects of OneStream Administration? (e.g., security)

IT professionals should start with the GSWO course, as well as the Configuring Core Application Security course if responsible for security. If the IT professional is also involved in data integration, dimension build, or workflow setup, they should also consider taking the OSA instructor-led course or IOS course. Additionally, we recommend a video series in OneStream Navigator called: Conversations with IT.

What is the difference between the OneStream Administration course and the retired Application Build for Administrators (ABA) course?

ABA was designed as our staple instructor-led course for everyone to take, whether they were at the beginning of an implementation or new

administrators for an existing application. The new OneStream Administration course focuses on helping administrators who already have access to an application and need to maintain it whilst improving their understanding of wider OneStream community resources and topics.

Besides the core OneStream project implementation and administration team, who else should complete training?

Anyone that is part of the project implementation team or who will use the outputs of OneStream to make business decisions should complete the GSWO course. Additionally, the implementation team should create a training and communication plan to roll out to OneStream end users following implementation to drive understanding and adoption.

What does end user training consist of? Who creates the plan and executes it with them?

End user training is usually prepared and delivered on the project with or by the implementation team or by an experienced OneStream customer administrator, who has completed the GSWO, OSA or IOS, and BBR courses. Power users should attend the GSWO and BBR courses.

What additional training should I consider when taking ownership of my implementation after a “go-live” with a OneStream implementation partner?

Functional administrators who need more information after completing the Administrator Readiness Learning Path could consider the IOS and or Designing an Application (DaA) course. These courses are geared primarily towards implementation consultants but offer more application build insight and context. This could serve as a refresher in some areas and greater depth in others. The DaA course covers advanced design and build concepts around OneStream Metadata, Workflow, Rules and BI Blend. Specialty courses should also be considered if you are adding specialist solution such as Cash Planning, OFC and more to your application.

How do I help my organization embrace “the new way” after implementation? For example, with the simple, but sticky changes like moving from SmartView to OneStream’s version.

From a technical training perspective, empowering power users with GWSO plus BBR can help the transition.

How do I maintain the knowledge of my administrators, power users, and end users over time as the organization changes, and to keep current with the product?

Administrators can stay current in a range of ways including: participating in ONECommunity forums, attending Splash events, completing platform Release Differences training, webinars,

podcasts, and other micro-courses and content available on OneStream Navigator and with the Navigator Passport subscription.

What is Release Differences training and how is it different from other GES training?

Release Differences training provides a technical explanation of new or changed product features and is made available alongside each new OneStream software release. You should view this content only after you’ve built a foundational understanding of the product, for example through the Administrator Readiness Learning Path. Release Differences training is freely available to OneStream customers and partners, and can be found on OneStream Navigator with titles such as “7.4.0 Platform Release – March 2023.” Note that Release Differences training excludes hands-on lab exercises.

How do I advance my skills beyond the fundamentals?

Consider advanced courses like Level 3 Dashboards, engage other professionals on ONECommunity and watch for new learning assets releasing on OneStream Navigator in the coming months, such as: QuickTips videos, Tech Talks, Power Hour webinars, the official OneStream Podcast and advance usage videos.

Will completing training earn Continuing Professional Education (CPE) credits?

Yes, OneStream’s training is compliant with the National Association of State Boards of Accountancy (NASBA) requirements to issue CPE credits. See the course description for how many credits are associated with each course.

After determining my learning path, can I bookmark the courses I need to complete in OneStream Navigator?

Yes, learners are able to bookmark courses in OneStream Navigator. You can also find courses that you have completed in your Navigator transcript.

Can I “test out” of a course?

No. OneStream Navigator marks a course complete when you pass all in-course assessments with 70% or higher and attest to completing the hands-on lab exercises (if applicable).

CERTIFICATION

Do I need to take all courses shown in the learning path before taking a certification exam?

No, the paths shown are examples. Check the course or OneStream Certified Exam description for prerequisites and recommended study.

Will these courses help prepare me to become OneStream Certified?

Yes. Most courses include lab exercises that provide practical hands-on experience with the product, which will help consultants and administrators prepare both for the real world and OneStream Certification Exams. Refer to Certification Exam Study Guide for a full list of resources to prepare.

What is the difference between “recertification” and “certification extension”?

Recertification is when someone has already passed an exam and has decided to pass a newer version of the exam (i.e. completely different exam). This is required when a new version of the exam is available. Certification extension means that a currently certified individual receives notice that their certification will be expiring soon, but a newer version of an exam is unavailable. The individual has the option to retake the existing version of the exam or submit OnePoints evidence for learning and activities to extend the validity of their certification for an additional 24 months.

What are OnePoints?

OnePoints is a path to extend individuals' certified status by earning points for completing activities such as OneStream training, Tech Talks, conferences, and technical webinars among many others. Accumulating 40 OnePoints over 24 months allows individuals to extend their certified status for an additional 24 months. Learn more about [OnePoints](#).

PURCHASING

Is it possible to receive a higher discount on training purchases if my company buys in volume?

Yes. Companies can receive volume discounts when pre-paying for training. Discounts start with volume purchases of \$25K USD.

How long will I have access to a course if I purchase à la carte?

1. 90 calendar days.
2. If you purchase the Navigator Passport subscription, the course will be available for the duration of your subscription contract (a minimum of one year).

If I attend an Instructor-Led Training (ILT) class, will I automatically get access to the equivalent on-demand training in OneStream Navigator?

No. We encourage you to consider purchasing the Navigator Passport subscription to access all the on-demand content available, both to refresh on what you learned in an ILT course and to pick up new knowledge and skills. The Navigator Passport subscription will also entitle you to 25% off ILT purchases during the term of your subscription.

Will I be able to revisit courses that I have already completed? For example: brushing up on Administrator Readiness Learning Path courses after implementation is complete.

Yes, and this is strongly encouraged.

Learners who have completed a course will have the ability to revisit the content as long as they are either:

- A. **À la carte:** within 90 days of course purchase *or*
- B. **OneStream Navigator Passport:** within one year of subscription purchase (minimum).

Am I able to preview a course before purchasing?

Yes, the first lesson of each course is available for preview in Navigator, though the size of the lesson varies by course. Note that lab exercises are only available once a course is purchased à la carte or through a Navigator Passport subscription.