

ON-DEMAND TRAINING / INSTRUCTOR-LED TRAINING

ONESTREAM ESSENTIALS

Getting Started with OneStream

Course Description

This foundational course is designed for technical professionals at the beginning of their journey with OneStream. Learners begin with an overview of OneStream from an end user's point of view before exploring the core concepts of OneStream administration. Through guided, hands-on exercises in a safe lab environment, learners gain exposure to key responsibilities and tasks. While the course does not provide full proficiency, it serves as a critical first step and is a required prerequisite for all advanced OneStream administrator training.

Learning Objectives

After completing this course, learners will be able to:

- Define what OneStream is and how it supports business performance
- Distinguish the roles and responsibilities of end users versus administrators
- Complete a typical Financial Close workflow and a sample Planning workflow
- Use fundamental reporting capabilities in OneStream
- Define the key concepts of the OneStream data model
- Discover the fundamentals of administering an application for end users

Who Should Take This Course

This course is the very first step for anyone starting their OneStream journey, whether you are a client who will administer the platform for your organization, a partner consultant implementing OneStream, an instructor, or a brand-new OneStream user. This course serves as a prerequisite for more advanced courses.

Prerequisites and Advanced Preparation

Prior to taking this course, it is helpful, but not necessary, to have a working knowledge of common finance and accounting concepts.

Duration

- Instructor-Led: 1-Day
- On-Demand: 6 Hours

Registration

Training registration and payment are completed through our online registration system. Payments can be made by credit card or wire transfer. Once registration is complete, you will receive a training confirmation and a receipt. This course is available in two formats: Instructor-Led (group live-facilitated/group internet-based) and self-paced On-Demand. Both formats provide access to our lab environment, allowing you to complete hands-on exercises and build practical skills in a safe, guided setting.

Questions? Contact the Training Support Team by submitting a case form on the [ServiceNow Support Portal](#).

Class Size

Public classes require a minimum of four students registered within seven days of the class start or they may be cancelled at OneStream's discretion. Once the registered class size reaches its limit (differs by location), it will be closed to additional students.

Continuing Professional Education Credits

OneStream Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website at: www.NASBARegistry.org.

8 CPE Credits are available for attending the ILT version of this course in the area of Finance (8). 7 CPE Credits are available for attending the On-Demand version of this course in the area of Finance (7). Contact the [Training Support Team](#) if you have interest in CPE Credits for this course.

Agenda

Part 1: Discovering OneStream as an End User

- OneStream Overview
 - The OneStream Platform
 - OneStream Users
 - Key Concepts and Definitions
 - Accessing OneStream
- Completing Financial Close and Planning Workflows
 - Financial Close and Consolidation
 - Financial Planning and Analysis (FP&A)
 - Operational Planning and Analysis

- Reporting in OneStream
 - OneStream Reporting Options
 - Introduction to the Excel Add-in

Part 2: Exploring OneStream as an Administrator

- Exploring the OneStream Data Model
 - A Day in the Life of an Administrator
 - FX Rates

Student Cancellation

Please refer to the cancellation schedule listed below. If you cannot attend a training class, you are permitted to send another employee from your company at no additional charge or choose to have a credit made to your account to use toward a future class.

All cancellations, substitutions and modifications are completed via our online registration system.

Cancellation Schedule

14 or More Days	13 to 7 Days	Under 7 Days
No charge; full refund	50% of fee charged	Full fees charged; no refund