

CLASS AGENDA

ONESTREAM ESSENTIALS

Implementing OneStream



Course Description

In this five-day course, participants will learn how to fulfill requirements set by a fictional customer by building a Dimension Library, setting up Cubes and Extensibility, creating Workflows, and running basic calculations.

Learning Objectives

After completing this course, learners will be able to:

- ✓ Build metadata using the Dimension Library
- ✓ Set up cubes and extensibility
- ✓ Create workflows for data entry
- ✓ Run basic calculations

Who Should Attend

This course is intended for starting Consultants and other technical roles involved in the implementation of OneStream. The program level of this course is beginner.

Prerequisites and Advanced Preparation

Prior to taking this course, you should have completed the following course, or possess equivalent knowledge:

- ✓ OneStream Essentials: Getting Started with OneStream

Prior to Attending Training

In addition to the course prerequisite above, all attendees must be proficient with concepts such as: navigating OneStream, cube views, dimensionality, and basic member filters and expansions. This course does not review content from other classes.

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 offered as Instructor-Facilitated (group-live/group internet-based) and self-paced On-Demand.

Questions? Contact the Training Support Team: training@onestreamsoftware.com.

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 LLC 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.



40 CPE Credit are available for attending this course (Instructor-Led only) in the areas of Finance (24) and Information Technology (16). Contact the [Training Support Team](#) if you have interest in CPE Credits for this course.

Agenda

Day 1

- ✔ OneStream Project
 - Getting Started with a OneStream Project
 - Kicking off a OneStream Project
- ✔ Adding Dimensions
 - Configuring the Time Dimension
 - Building Out the Dimension Library
 - Adding Information Through Metadata Builder
- ✔ Cubes and Extensibility
 - Basic Cube Configuration
 - Level 1 Data Unit

Day 2

- ✔ Cubes and Extensibility (Continued)
 - Extensibility and Cube Design
 - Revisiting Metadata
- ✔ Building the Workflow
 - Basic Cube Configuration
 - Connecting Metadata to Workflow

Day 3

- ✔ Building the Workflow (Continued)
 - Connecting Metadata to Workflow
- ✔ Importing Data into OneStream
 - Loading OneStream Data to the Cube
 - Setting Up and Managing Data Sources
 - Building Transformation Rules
 - Importing Data into OneStream
 - Level 2 Data Unit
 - Historical Imports

Day 4

- ✔ Importing Data Into OneStream
 - Enhancing the Workflow Import Step
- ✔ Setting Up OneStream for Data Entry
 - Understanding Data Entry Options
 - Creating Form Templates
 - Workflow Setup and Configuration

- Keying in Data Through a Cube View Form
- Using Spreadsheet/Excel Add-In for Data Entry
- Using Journals
- ✔ How to Run Calculations in OneStream
 - Getting Started with Financial Calculations

Day 5

- ✔ How to Run Calculations in OneStream (Continued)
 - Running Calculations
- ✔ Finalizing the Workflow
 - Creating Confirmation Rules
 - Configuring Certification
 - Wrapping up the Workflow
- ✔ Workflow Design
 - Diving into Workflow Design
 - Designing a Workflow Structure
 - Expediting the Workflow Build

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

No charge; full refund

13 to 7 Days

50% of fee charged

Under 7 Days

Full fees charged; no refund