



keyteach

OneStream: Enablement Training for Project teams

This two-day course provides an understanding of OneStream that enables project teams to make a more valuable contribution to the design and implementation of OneStream XF applications.

Enable project teams to make a more valuable contribution to the design and planning of OneStream XF applications. It covers all capabilities of the system and explores the interface and common terminology. Ideal for project teams that need to get up to speed fast before the application design process begins.

Explore OneStream dimensionality, learn how data can be entered and loaded, consolidated, adjusted, translated and then analysed.

Attendees will explore the powerful import functionality used to populate Actuals from source systems and find out about OneStream's extensible dimensionality available when entering data to Budgets and Forecasts.

Explore the 'People Planning' market place app, learn about drivers and assumptions and find out more about the what-if modelling capabilities of the system. Attendees will also

explore the Capital Planning and Planning Allocations functionality.

This course provides project teams with an appreciation of standard, repeatable workflow processes and demonstrates how data is validated and certified.

Attendees will learn about journal adjustments and how intercompany is processed. They will also find out about forms and cube views and gain an appreciation of how to analyse information through dashboards and reports as well as the OneStream XF Add-In for Excel.

This is the perfect way to start a OneStream XF implementation, providing a thorough grounding in functionality, terminology and concepts. It will help inform the decisions that need to be taken during the early design and build phase of an implementation.

Course Information:

Audience:	Project Team Members
Pre-requisites:	None
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	14 Credits - Computer Software and Applications
Programme Level:	Intermediate

Summary by Day:

Day 1: Overview, Navigation, Dimensionality, Working with Cube Views, Import Channel, Intercompany Processing, Journal Adjustments, Workflows, consolidation

Day 2: Budgeting and Forecasting, People Planning, Capital Planning, Planning Allocations, Dashboards, Reporting, OneStream XF MarketPlace, XF Excel Add-In, Quick Views, XF Functions

Detailed Agenda

OneStream XF Overview
OnePlace Panels

Navigating the Workflow

- Workflow Point of View
- Using Forms
- Complete and Revert Forms Workflow

Review OneStream Dimensions

- Entity & Consolidation Dimensions
- Account & Flow Dimensions
- Origin and User Defined Dimensions
- Metadata Management

Cube Views

- Setting the Cube Point of View
- Working with Cube Views
- Calculate, Translate & Consolidate
- Exporting Cube Views

Import Channel

- Transformation Rules
- Load and Transform
- Validate Transformations
- Load and Drill-Down

Intercompany Processing

- Mechanics of Intercompany
- IC Matching Reports & Dashboards
- IC and Annotations
- Review Partner Status

Working with Journals

- Journal Templates
- Create Submit & Quick Post
- Journal Reports

Certify Workflow

- Process Cube
- Confirm Step and Validations
- Certify & Sign Off

Consolidating Data

- Translation Settings
- Calculation Status

Budgeting, Planning and Forecasting

- Extensible Dimensions
- Data Entry Methods
- Spreading Types
- People Planning Market Place App
- Drivers and Assumptions
- What-If Modelling
- Capital Planning
- Planning Allocations

OneStream Dashboards

Guided Reporting

- Creating Reports
- Book Publishing

OneStream XF MarketPlace

XF Excel Add-in

Working with Cube Views

- Cube POV Review
- Cell POV Information
- Convert to XF Functions

Quick Views

- Creating Quick Views
- Quick View Options
- Member Filter Builder
- Dynamic Quick Views

XF Functions

- Function Syntax
- XFGetMmeberInfo
- XFGetCell
- XFSetCell