



keyteach

OneStream: Project Team Training (2 days)

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

Enable project teams to make a more valuable contribution to the design and planning of OneStream applications. This course 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.

This course explores the OneStream dimensions, how data can be entered and loaded, consolidated, adjusted, translated, and then analysed. Attendees will explore the powerful data import functionality from source systems and find out about OneStream's extensible dimensionality allowing for differential levels of granularity across scenarios and entities.

Explore the budgeting and forecasting dashboards, planning drivers and assumptions and find out more about the spreading techniques, seeding data and the what-if modelling capabilities of the platform.

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 reports and books as well as the OneStream Add-In for Excel.

This is the perfect way to start a OneStream 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.

This course is designed for project team members. System Administrators should attend the OneStream Application Build for Administrators training course.



AUTHORIZED TRAINING PARTNER

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OneStream: Project Team Training

Course Information:

Audience:	Project Team Members
Pre-requisites:	None
Duration:	2 days
Delivery Method:	Classroom (Group-Live and Group Internet-Based)
Advanced Preparation:	None
Recommended CPE Credits:	14 Credits - Computer Software and Applications
Programme Level:	Beginner

Summary by Day:

Day 1: Overview, introduction and navigation, terminology, dimensionality, working with cube views, importing data, consolidation, translation and calculation, intercompany, journals, workflow completion.

Day 2: Budgeting and forecasting dashboards, planning drivers, data spreading techniques, seeding data, what-if analysis, reports, books, Excel Add-In, using cube views, quick views, the member filter builder and XF Functions.

Detailed Agenda

INTRODUCTION AND NAVIGATION

OneStream overview

OnePlace panels

Navigating the workflow

- Workflow point of view
- Using forms
- Complete and revert forms

Review OneStream dimensions

- Cubes and extensibility
- Entity and Consolidation
- Account and Flow
- Origin and User Defined Dimensions
- Metadata management

Working with Cube Views

- Setting the cube point of view
- Calculate, translate and consolidate

Loading Data

- Data sources
- Transformation Rules
- Load and Transform
- Validate Transformations
- Drill-down/back

Working with forms

FINANCIAL CONSOLIDATION

Intercompany processing

- Mechanics of Intercompany
- IC matching reports & dashboards
- IC and annotations
- Review partner status

Working with Journals

- Journal templates
- Create, submit and quick post
- Journal reports

WORKFLOW PROCESSES

Completing the workflow

- Submission Status
- Process cube
- Process confirm step and validations
- Certify and sign off

UNDERSTANDING CONSOLIDATION

Consolidating data

- Consolidation
- Translation
- Calculation status

FINANCIAL PLANNING AND ANALYSIS

- Budgeting and forecasting dashboards
- Planning drivers
- Spreading techniques
- Seeding data
- What-If modelling

REPORTING LANDSCAPE

Guided Reporting

Analysis wizard

Reports

Books

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
- XFGetMemberInfo
- XFGetCell
- XFSetCell



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