



keyteach

OneStream: End User Training (2 days)

This two-day course provides an essential foundation for end users of OneStream applications, covering all aspects of system functionality and providing a valuable insight into common processes.

Learn about the dimensionality and functionality of OneStream from a user's perspective. This course delivers an essential hands-on foundation for end users of OneStream applications, providing an informative exploration of system functionality, and an opportunity to assess the true capabilities of this financial planning and analysis platform.

Explore the OneStream dimensions, learn how data can be entered and loaded, consolidated, adjusted, translated, and then analyzed. Discover the powerful data import functionality from source systems and learn more about the OneStream platform's extensible dimensionality.

Find out more about budgeting and forecasting dashboards, planning drivers and assumptions and learn about the spreading techniques, seeding data and the what-if modelling capabilities of the platform. Gain an appreciation of the standard, repeatable workflow processes and find out how data is validated and certified.

Attendees will find out about journal adjustments and how intercompany is processed. They will also learn about the calculation and the submission status of data, as well as an understanding about how data in OneStream is aggregated, calculated, translated, and consolidated.

Find out about forms and cube views and discover how to analyze information through reports and books.

Explore the choices available for analyzing OneStream data in Microsoft Excel including cube views, quick views, and functions. Learn about the different types of functions available and gain an understanding of the syntax used to create highly formatted, structured reports.

Attendees will also learn how extensible documents can be used to display data from OneStream in other Microsoft Office products including Microsoft Word and PowerPoint.



**GLOBAL AUTHORIZED
TRAINING PARTNER**

keyteach

+1 855 563 6723 | +44 161 408 7722
info@keyteach.com

OneStream: End User Training

Course Information:

Audience:	OneStream End Users
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

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 UD 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

INTERCOMPANY

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

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

FINANCIAL PLANNING AND ANALYSIS

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

REPORTING LANDSCAPE

- Guided Reporting
- Analysis wizard
- Reports and books

EXCEL ADD-IN - CUBE VIEWS

- Understand how cube views can be used in Excel for data analysis
- Working with named ranges to modify formatting
- Drill down
- Submitting forecast data
- Cell comments
- Supporting documents

EXCEL ADD-IN - QUICK VIEWS

- Overview of quick views
- Methods for creating quick views:
- Pivoting dimensions
- Controlling the placement of rows and columns
- Member filter builder
- Dynamic POV expressions

EXCEL ADD-IN - FUNCTIONS

- Introducing the functions available for creating reports
- Create and build functions
- Function syntax:
 - XFGetMemberInfo
 - XFGetCell
- Copy and fix cell references in functions
- Submitting data with XFSetCell
- Cell POV Information
- Converting quick views to XFGetCell functions
- Copy and paste the POV as XFGetCells

USING EXTENSIBLE DOCUMENTS

- Overview of extensible documents for Microsoft Word and Powerpoint
- Running and updating extensible documents to display dynamic embedded content
- Using object lookup to insert parameters, substitution variables and image content



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