

# OneStream Essentials Training

*COURSE CONTENT*

## GET IN TOUCH



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## About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

## About Course

The OneStream Essentials Training by Multisoft Systems is designed for professionals looking to enhance their expertise in corporate performance management. This course provides a strong foundation in OneStream's key functionalities, including data integration, financial consolidation, planning, budgeting, forecasting, and reporting.

## Module 1: Getting Started with OneStream

- ✓ OneStream Overview
- ✓ In the OneStream Product
- ✓ Introduction to Metadata
- ✓ Introduction to Cubes
- ✓ Introduction to Workflow
- ✓ Introduction to Reporting

## Module 2: OneStream Administration

- ✓ Introduction to the Administrator Role
- ✓ Application Tools for Administrators
- ✓ Managing Users, Application Extracts, and Distinguishing Environments
- ✓ Application Properties
- ✓ Working with Dimensions and Members
- ✓ Working with Extensibility
- ✓ Working with Cubes
- ✓ Building the Workflow
- ✓ Data Sources
- ✓ Transformation Rules
- ✓ Configuring the Workflow for Data Import
- ✓ Importing Data
- ✓ Options for Data Entry
- ✓ Setting up Form Templates
- ✓ Manual Data Entry Using Forms
- ✓ Investigating Data
- ✓ Processing the Workflow
- ✓ Confirming Data Quality
- ✓ Signing Off the Data
- ✓ Workflow Administration Tools

- ✓ Comparing and Extracting Metadata
- ✓ Communicating Changes with Dashboards
- ✓ Considering an Upgrade
- ✓ Upgrading
- ✓ Increasing Your Knowledge

## **Module 3: Building Basic Reports**

- ✓ Reporting and OneStream
- ✓ Connecting Reports to
- ✓ Application Design
- ✓ Building a Simple Cube
- ✓ Using the Member Filter
- ✓ Cube View Performance
- ✓ Introduction to Formatting
- ✓ Building Calculations
- ✓ Applying Overrides
- ✓ Parameters Overview
- ✓ Parameter Types
- ✓ Introduction to Report Books
- ✓ Adding Content to Report
- ✓ Books
- ✓ Quick Views
- ✓ Cube Views in Spreadsheet
- ✓ OneStream Retrieves

## **Module 4: Configuring Core Application Security**

- ✓ Relationships between users, groups, roles, and objects
- ✓ Security toolbar icons
- ✓ Exclusion groups
- ✓ Areas throughout OneStream where security can be applied

- ✓ Steps for creating and cloning users
- ✓ Steps for creating groups and for adding users and groups to groups
- ✓ Impact of dimension and dimension member security on users' access to dimensions, members, and data
- ✓ Security options available on cubes
- ✓ Workflow security properties
- ✓ System Roles and Application Roles
- ✓ Relationship between role security and object security
- ✓ MarketPlace Security Template
- ✓ Slice security overview

## Module 5: Implementing OneStream

- ✓ 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
- ✓ Cubes and Extensibility (Continued)
  - Extensibility and Cube Design

- Revisiting Metadata
- ✓ Building the Workflow
  - Basic Cube Configuration
  - Connecting Metadata to Workflow
- ✓ 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
- ✓ 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
- ✓ 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

## Module 6: Building Dashboards

- ✓ Explore Dashboards from an End User Perspective
- ✓ The Power of Dashboards in OneStream
- ✓ Explore Dashboards from an Administrator Perspective
- ✓ Workspace Structure and Design Mode
- ✓ Edit Dashboard Components
- ✓ User Interface Components and Formatting
- ✓ Data Components and Data Adapters
- ✓ Create a Dashboard Using BI Viewer
- ✓ Workspace Structure and Naming Conventions
- ✓ Cube Views as Sources of Data and Data Adapters
- ✓ BI Viewer Component
- ✓ Create a Dashboard from Scratch
- ✓ Dashboard Structure and Layout
- ✓ Grid Layout Type Properties
- ✓ Dashboard Charts

- ✓ Add Interactivity Components to a Dashboard
- ✓ Add Interactivity to Dashboard Data
- ✓ Add Interactivity through Buttons
- ✓ Deploy Dashboards to End Users
- ✓ Methods of Deploying
- ✓ Dashboards to End Users
- ✓ Maintain an Administrator Dashboard
- ✓ Solution Exchange Dashboard
- ✓ Examples Custom Built Administrator Dashboards
- ✓ Build a Landing Page Designing and Building a
- ✓ Landing Page Deploying a Landing Page
- ✓ Troubleshooting Challenge Troubleshooting Dashboard Issues
- ✓ Focused Building Challenge
- ✓ Final Build Challenge

## Module 7: Writing Financial Calculations

- ✓ OneStream Member Formulas and Business Rules
- ✓ Structure of OneStream Data
- ✓ Member Formulas and Business Rules
- ✓ Calculation Syntax and Layout
- ✓ Rule and Formula Editor Options
- ✓ OneStream Dynamic Calculations
- ✓ Dynamic Calculations
- ✓ OneStream Data and Its Impact on Rule Writing
- ✓ Data Unit and Data Buffer
- ✓ Query and Analyze Data Records
- ✓ Data Storage and Cell Status
- ✓ Calculations with `api.Data.Calculate`
- ✓ Introduction to `api.Data.Calculate`
- ✓ OneStream's Consolidation and



- ✓ Calculation Algorithm
- ✓ The Data Unit Calculation Sequence (DUCS)
- ✓ Consolidation Algorithm
- ✓ Calc Status and Running Consolidations
- ✓ Expanding on api.Data.Calculate
- ✓ Best Practices for api.Data.Calculate
- ✓ Common Finance Functions
- ✓ Custom Calculate
- ✓ Custom Calculations
- ✓ Running Custom Calculations
- ✓ Expanding on Data Buffer Calculations
- ✓ Unbalanced Math
- ✓ Expanding on Data Buffer Calculations (continued)
- ✓ Data Buffer Cell Loops Troubleshooting
- ✓ Task Activity and Error Log Resolving Errors
- ✓ Calculation Management and Reporting
- ✓ Calculation Management and Reporting
- ✓ Writing Common Calculations
- ✓ Seeding Calculations
- ✓ Balance Sheet and Flow Calculations
- ✓ The View Dimension Built-In Calculations
- ✓ Globalizing Code Resources
- ✓ OneStream Resources