

## COURSE DESCRIPTION

# Level 2: Financial Model Rules

This two-day, hands-on course discusses the OneStream Finance Engine including Dynamic Calculations, Stored Calculations and Finance Business Rules. It provides guidance on calculation optimization and performance impacts and highlights additional resources available to rule writers.

## Learning Objectives

After completing this course, learners will be able to:

- ✓ Discuss OneStream's Finance Engine and related concepts
  - Dynamic Calculations
  - Stored Calculations
  - Finance Business Rules
  - Key VB.Net concepts and helpers
- ✓ Build and maintain Stored Calculation Member Formulas
  - Adding conditions
  - Filtering stored calculations
  - Creating flow calculations
- ✓ Discuss advanced Stored Calculations topics
  - Evals and Data Buffers
  - Data Explosion
- ✓ Build and maintain Dynamic Calculation Member Formulas
- ✓ Identify the parts and functions of Finance Business Rules
- ✓ Discuss methods to optimize calculations and performance

## Who Should Attend

This course is intended for Administrators and OneStream Implementers.

## Prerequisites and Advanced Preparation

Prior to taking this course, learners should complete the following courses, or possess equivalent knowledge:

- ✓ OneStream Essentials: OneStream Administration  
or
- ✓ OneStream Essentials: Implementing OneStream

VB.NET skills and knowledge of Object-Oriented concepts are required in order to complete the course material. Other resources to review:

- ✓ [Bob Tabor's Introduction to Key Concepts](#)
- ✓ [Bob Tabor's Website](#)
- ✓ [TutorialsPoint](#)
- ✓ [FunctionX](#)
- ✓ [Stack Overflow](#)

**Note:** This class is taught with exercise material embedded within a PowerPoint file. To avoid switching between the browser and PowerPoint, OneStream recommends using a second monitor to display the PowerPoint file.



## 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](http://www.NASBARegistry.org).



16 CPE Credits are available for attending this course in the areas of Finance (12) and Information Technology (4). Contact the [Training Support Team](#) if you have interest in CPE Credits for this course.

## 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).

Questions? Contact the Training Support Team by submitting a case form on the [ServiceNow Support Portal](#).

## Agenda

### Day 1

- ✓ OneStream Finance Engine
  - Key VB.Net Concepts and Helpers
- ✓ Stored Calculation Member Formulas
  - Adding Conditions and Filtering
  - Flow Calculations
  - Remove Functions

### Day 2

- ✓ Advanced Stored Calculations
  - Evals and Data Buffers
  - Data Explosion
- ✓ Dynamic Calculation Member Formulas
- ✓ Business Rule Breakdown
- ✓ Finance Business Rules
- ✓ Calculation Optimization and Performance
- ✓ Member Lists

### 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