

COURSE DESCRIPTION

Level 2: Specialty Planning

This two-day, hands-on course covers the main aspects of the Specialty Planning Solutions with a focus on Thing Planning. This class demonstrates how to incorporate 'specialty' data sets within an application that go beyond the traditional Financial Cube. Attendees will configure this solution to perform calculations and data analysis through a Budget Scenario and guided Workflow.

Learning Objectives

After completing this course, learners will be able to:

- ✓ Discuss use cases for Specialty Planning solutions
- ✓ Discuss Thing Planning and the requirements gathering process
- ✓ Perform application setup and configuration
- ✓ Complete the steps to set up Thing Planning:
 - TLP Plan Drivers
 - TLP Calculation Definitions
 - TLP Calculation Plan
 - TLP Plan Analysis
 - TLP Results Import to Financial Model
 - TLP Administrations

Who Should Attend

Administrators and OneStream Implementers should attend this course.

Prerequisites and Advanced Preparation

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

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

In addition to the course prerequisites above, all learners must be familiar with the financial model including OneStream Dimensionality and Cubes. All learners must be proficient with concepts such as Workflow, Member Formulas, Finance Business Rules, Cube Views and Dashboards. The basic concepts of these features are covered in the courses listed above and will not be covered in this class.

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](#).



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.



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.

Agenda

Day 1

- ✓ Introduction to the Specialty Planning Solutions
 - Overview of the Solutions
 - Relational Blending Engine and Specialty Planning
 - High Level Data Flow
- ✓ Thing Planning Introduction and Requirements
- ✓ Application Setup and Configuration
 - Cube
 - Scenario Dimension
 - Workflow Profile
- ✓ Thing Planning Setup
 - Global Options
 - Activity Types
 - Accounts
 - Register Configuration
 - Status
 - Control Lists

Day 2

- ✓ TLP Plan Drivers
 - Global Drivers
 - TLP Regional Drivers (cube based)
- ✓ TLP Calculation Definitions Page
 - Allocation Methods
 - Calculation Plans
 - Execution Lists
- ✓ TLP Calculation Plan
 - Calculating the plan
 - Making iterative changes to the plan
- ✓ TLP Plan Analysis
 - Plan Tasks, Impact, Report
 - Plan Variance Reports, Listing Reports
- ✓ TLP Results Import to Financial Model
- ✓ TLP Administrations
 - Upgrade considerations/impacts
 - Audit features

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