



## Level 2 Financial Model Rules

### Course Description

This two-day, hands-on course will discuss 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.

### Who Should Attend

Only expert administrators who will write rules or advanced implementation services professionals should attend. The program level of this course is advanced.

### Prerequisites and Advanced Preparation

Must have attended the Application Build for Administrators or Application Build for Consultants class.

VB.NET skills and knowledge of Object Oriented concepts are required in order to complete the course material. A suggestion for an overview is Bob Tabor's roughly 8 hours of videos on introduction to key concepts available at <https://www.youtube.com/watch?v=A9f0hz3FgrQQ>. You can also visit Bob Tabor's site at: [www.bobtabor.com](http://www.bobtabor.com). Other resources are: [www.tutorialspoint.com/vb.net/index.htm](http://www.tutorialspoint.com/vb.net/index.htm), [www.functionx.com/vb/index.htm](http://www.functionx.com/vb/index.htm), and <https://stackoverflow.com>.

**Note:** This class is taught with exercise material embedded within a PowerPoint file. With the exception of the Rochester location, users will only have one screen to use either on a laptop or monitor. **To avoid having to switch back and forth between the Internet browser and PowerPoint during class exercises, OneStream recommends bringing a laptop or tablet to training in order to display the PowerPoint file separately.**

### Registration

Training registration and payment are completed through our online registration system via the OneStream University website: [www.onestreamsoftware.com/services/training](http://www.onestreamsoftware.com/services/training). Payments can be made by credit card or wire transfer. Once registration is complete, you will receive a training confirmation and a receipt.

Questions should be directed to [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) or OneStream Support Portal at +1 (844) 663-3474.

### 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.

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## 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

## 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 [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) if you have interest.