

OneStream for Financial Analysts 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 for Financial Analysts Training by Multisoft Systems is a comprehensive program designed to equip finance professionals with the skills to streamline financial processes and improve decision-making. This training focuses on mastering OneStream's unified corporate performance management (CPM) platform—enabling participants to manage budgeting, forecasting, financial consolidation, and reporting efficiently.

Module 1: Introduction to OneStream

- ✓ Overview of OneStream and its capabilities
- ✓ Understanding the corporate performance management (CPM) framework
- ✓ Installation and setup of OneStream XF

Module 2: Data Management in OneStream

- ✓ Connecting to data sources
- ✓ Loading and validating financial data
- ✓ Data transformation and mapping

Module 3: Financial Reporting and Analysis

- ✓ Creating financial reports with OneStream Report Studio
- ✓ Building interactive dashboards and visualizations
- ✓ Using analytics for variance analysis and performance tracking

Module 4: OneStream Workflow and Automation

- ✓ Understanding OneStream workflows and task management
- ✓ Automating financial processes
- ✓ Scenario planning and forecasting

Module 5: Advanced OneStream Features

- ✓ Using OneStream Marketplace solutions
- ✓ Integration with external financial and ERP systems
- ✓ Best practices for OneStream security and user management

Module 6: OneStream Certification Preparation

- ✓ Overview of OneStream certification options (OCP-FM, Implementation Consultant, etc)

- ✓ Exam objectives and key topics
- ✓ Practice questions and exam preparation tips

Module 7: Best Practices for Financial Analysis in OneStream

- ✓ Optimizing performance in OneStream
- ✓ Designing effective reports and dashboards
- ✓ Common pitfalls and how to avoid them