

# Improve Data Quality, Save Time, Save Money in the Budget Process with OneStream Software

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Budget formulation processes in the Federal Government are composed of quantitative data and narrative information that are gathered from across an agency and its bureaus. Issues in the formulation process and in creating and formatting justifications submitted to the Office of Management and Budget (OMB) can be costly. Many of these issues or discrepancies stem from spreading the budget formulation processes across multiple systems, throughout different bureaus and agency levels, including emailing spreadsheets. These issues increase rapidly the more times data is pulled in and out of different systems and edited, reviewed, and revised externally without version control.

## OneStream to the Rescue

Looking to address some of these issues, an agency that TCG supports through the Budget Line of Business implemented a commercial off-the-shelf (COTS) product, OneStream. OneStream is [corporate performance management \(CPM\)](#) software platform and, unlike other systems, it is a unified solution that eliminates much of the need to build and maintain multiple applications. OneStream allowed the agency to consolidate as much of the formulation processes as possible through one application, eliminating duplicative work, and reducing errors in data entry and manual processes.

Having one central application for collecting data for the formulation processes provides an authoritative source for budgetary data, allowing for advanced analytics and effective reporting, as data can be structured and drilled down on or rolled up in multiple ways.

## Adapting to a New System

OneStream is highly configurable, which is exactly what you want in a new solution at a complex organization, but this does mean that a learning curve must be traveled, as there is when implementing any new system. To address this, OneStream offers a sandbox environment, an instance of the system used for training purposes, in which users would be able to follow along with a live training to familiarize themselves with the process before the system is “live” or open for user access. The sandbox environment in tandem with offering many trainings has led to successful implementation of the system across the agency.

## Managing Data in OneStream

The agency supported by TCG enters and houses their data in OneStream where it is structured, tagged, and further categorized by certain parameters such as the agency as a whole, the bureau, the appropriation, and individual programs. OneStream holds the single source of data that can be

pulled as a report and then used for OMB Justifications (OMBJs) and Congressional Justifications (CJs). These reports, known as “chapters” within each respective process, are then saved into OneStream’s “file explorer”. This offers secure access as well as document management such as version history and version control.

Understanding and customizing the basic data module of OneStream, called Cube Views, was integral to the success of the implementation. This revolved around effectively:

- Creating new Cubes Views with the appropriate parameters and tags for programs;
- Linking Views for analyzing data at a granular level; and
- Formatting Cube Views to deliver consistent, uniform reporting.

Cube Views are the data source for advanced analytics and the source for different visualizations/reports such as data grids in workflows and reports and charts for dashboards.

When building out Cube Views, users can search a “business rules repository” for pieces of code that dictate both functionality and how things are presented. This code eliminates the need to write business rules from scratch in order to develop new features or customize the application during the build phase.

TCG assisted the agency with establishing and documenting best practices for creating and formatting Cube Views, which was essential during surge periods in the Budget Formulation process. After the initial implementation, these best practices were revisited and changes were made to further improve how Cube Views should be customized in specific contexts, such as for different programs and end users who may need to look at and report data in different ways.

More information about OneStream and the supported budget formulation processes is available at [www.tcg.com/about-us/partners/onestream/](http://www.tcg.com/about-us/partners/onestream/).