

COURSE DESCRIPTION

Level 3: Dashboards

This two-day, hands-on course shows how to leverage Dashboards for true user interaction. It explores the Dashboard concepts of advanced data queries, Business Rule functions, custom layouts, Workflow integration, Data Blending and using Workspaces.

Learning Objectives

After completing this course, learners will be able to:

- ✓ Gather and interpret requirements for Dashboard Design
- ✓ Create custom layouts with MarketPlace Template Solutions
- ✓ Design Dashboard Workspaces
- ✓ Use custom calculations through Data Management Sequences
- ✓ Integrate Workflow tasks through Dashboard Extender Business Rules
- ✓ Design Dashboards for Relational Blending using Dashboard Data Sets, SQL and Method queries, and XFBR String Business Rules

Who Should Attend

This course is intended for Administrators and OneStream Implementers.

Prerequisites and Advanced Preparation

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

- ✓ OneStream Essentials: OneStream Administration or OneStream Essentials: Implementing OneStream
- ✓ OneStream Essentials: Building Basic Dashboards

In addition to the course prerequisites above, all attendees must have experience designing and implementing Dashboards. The basic concepts of a Dashboard Maintenance Unit will not be covered nor will step-by-step instructions be given. All attendees must be very comfortable with the concepts of a Dashboard Maintenance Unit, using Business Rules such as Dashboard Extenders, XFBR Strings and/or Dashboard Data Sets, advanced Dashboard Components and SQL data queries.

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 Computer Software and Applications (16). Contact the [Training Support Team](#) if you have interest in CPE Credits for this course.

Agenda

Day 1

- ✓ Dashboard Requirements and Design
- ✓ Creating Custom Layouts
- ✓ Dashboard Workspace Design
 - Using Custom Calculations via Data Management
 - Integrating Workflow Tasks via Dashboard Extender Business Rules

Day 2

- ✓ Dashboard Design for Relational Blending
 - Cube Data and Stage Data
 - Dashboard Data Sets and SQL Queries
 - Using XFBR String Business Rules
- ✓ Dashboard Design for Role Based Functionality

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