



# ONESTREAM

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## CLASSROOM

## Level 3 Dashboards

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### Course Description

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.

### Who Should Attend

Only expert administrators and OneStream implementers who have experience designing and implementing Dashboards.

### Prerequisites and Advanced Preparation

This is an advanced course. Students must have attended Application Build for Administrators and Level 2 Reporting.

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 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.

Complaints 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 three 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.

## 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



### Continuing Professional Education Credits

OneStream Software 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: [www.learningmarket.org](http://www.learningmarket.org)

16 CPE Credits are available for attending this course in the areas of Computer Software & Applications and Specialized Knowledge. Contact [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) if you have interest.

Program Level is Advanced.

### 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 fees charged

#### Under 7 Days

Full fees charged; no refund