



# Level 3 Dashboards

## Course Description

This 2-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, and data blending.

## 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, Level 2 Reporting and Level 2 Studio Basics.

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, wire transfer, or purchase order. 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 844-663-3474.

## Agenda

### Day 1

- Dashboard Requirements and Design
- Creating Custom Layouts
- Dashboard Workspace Design
  - Applying Data Management
  - Applying Custom Calculations
  - 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 Strings for Conditional Formatting

## Continuing Professional Education Credits

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16 CPE Credits are available for attending this course in the areas of Information Technology and Finance. Contact [training@onestreamsoftware.com](mailto:training@onestreamsoftware.com) if you have interest.

Program Level is Advanced.