



Level 3 Dashboards Agenda

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, 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, 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. Once registration is complete, you will receive a training confirmation and a receipt.

Complaints should be directed to training@onestreamsoftware.com or OneStream Support Portal at 844-663-3474.

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

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

Program Level is Advanced.

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.

Student Cancellation

Please refer to the cancellation schedule below. If you cannot attend a training class, you are permitted to send another employee from your company at no additional charge. If you need to do this, please adjust the name online in the registration system.

14 or More Days

No charge; full refund

13 to 7 Days

50% of fees charged

Under 7 Days

Full fees charged; no refund