OneStream® Global Education Services

CLASS AGENDA

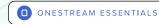◘ ONESTREAM ESSENTIALS

Building Basic Dashboards

Course Description
In this two-day, live course learners gain the hands-on skills needed to build basic Dashboards in OneStream. Topics include Dashboard Maintenance Units, Data Adapters, Dashboard Components and layouts, embedding Dashboards, and more.

Learning Objectives
After completing this course, learners will be able to:

- ☑ Create a Dashboard Maintenance Unit, and Dashboard Groups
- ☑ Design tabbed and grid Dashboard layouts
- ☑ Configure different Data Adapter types
  - ▪ Cube View and Cube View MD
  - ▪ Method Query
- ☑ Configure a BI Viewer Component
  - ▪ Pivot, Chart, Treemap and Pie Dashboard Items
  - ▪ Mastering Filtering and Drill-Down
  - ▪ Calculated Fields

Who Should Attend
This course is intended for Administrators, OneStream Implementers and other OneStream developers.

Prerequisites and Advanced Preparation
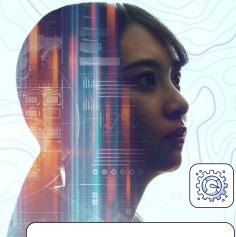Prior to attending this course, learners should complete the following courses, or possess equivalent knowledge:

- ☑ Getting Started with OneStream
- ☑ Building Basic Reports
  or
- ☑ Application Build for Administrators
- ☑ OneStream Essentials: Building Basic Reports
  or
- ☑ OneStream Essentials: Implementing OneStream
- ☑ OneStream Essentials: Building Basic Reports

In addition to the course prerequisites above, all attendees must be proficient with concepts such as: navigating OneStream, Cube Views, Dimensionality, and basic Member Filters and Expansions. This course does not review content from other classes. Other class content is not reviewed in this course.

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 Finance (12) and Information Technology (4). Contact the Training Support Team if you have interest in CPE Credits for this course.

Agenda

Day 1
- ☑ Dashboard Maintenance Units
- ☑ Data Adapters
- ☑ Dashboard Components
- ☑ Dashboard Layouts
- ☑ User Interface Actions
- ☑ Dashboard Designer
- ☑ Dashboard Files
- ☑ BI Viewer Component
  - ▪ Pivot Dashboard Item

Day 2
- ☑ Bi Viewer Component (continued)
  - ▪ Treemap, Pie and Chart Dashboard Items
  - ▪ Master Filtering
  - ▪ Drill-Down
  - ▪ Global/Local Color Scheme
  - ▪ Data Inspector
  - ▪ Calculated Fields
  - ▪ Filter Editor
- ☑ Copy/Paste Feature
- ☑ Dashboard Naming Conventions
- ☑ Bound Parameters

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	13 to 7 Days	Under 7 Days
No charge; full refund	50% of fee charged	Full fees charged; no refund