



# BrowserUX Early Access Programs Guide

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8.2.4 Release

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# Disclaimer

Anything you see in this program is subject to change and may or may not be included in a generally available software release.

## About This Guide

This guide introduces the OneStream BrowserUX client interface and highlights the benefits and differences of using this modern, web-accessible interface for OneStream end users. This guide is intended to:

- Familiarize OneStream end users, power users, administrators, partners, and consultants with BrowserUX navigational features and UI (user interface) elements.
- Provide prerequisites and directions for implementation of BrowserUX in a customer environment during various stages of development.
- Provide high-level information about supported features and capabilities, general usage patterns, end-user flows, and best practices.
- Provide high-level information about differences between the OneStream BrowserUX and Windows Client.

**NOTE:** This guide is intended for participants in the OneStream Early Access programs (for example, Private Preview for non-production use and Limited Availability for production use), as well as for internal OneStream teams, such as Consulting Services, Sales, and Customer Support.

# BrowserUX Overview

Welcome to BrowserUX, OneStream's latest web-based offering. BrowserUX works alongside the existing OneStream Windows Application to give users more options to access their data across a wide range of devices. In its initial phases, BrowserUX delivers a streamlined, modern experience that strives to provide comprehensive coverage of OnePlace features. With a strong foundation in updated technologies, BrowserUX will introduce a suite of innovative designs and improved solutions in future releases.

While we are representing much of the existing end user functionality, we are currently not supporting the use of MarketPlace solutions within BrowserUX. We will review these solutions on a case-by-case basis and report supported solutions in this documentation in future releases. Additionally, you will notice the System and Application Tabs are not available in BrowserUX.

The following sections highlight benefits, explore differences, and provide current limitations to help customers and partners evaluate BrowserUX for their business needs.

# **Early Access Programs Description**

Early Access Programs enable OneStream to validate new platform features and solutions with interested customers, gain feedback, and continuously improve the product.

The BrowserUX initiative has completed several months of customer feedback through a "Hosted Private Preview" and now is enabling BrowserUX in customer's cloud and self-hosted environments. Eligible customers for these programs must exhibit the following:

- A prescribed browser use case that OneStream Product & Engineering feels can be successful with the targeted platform version.
- The use case must have a targeted audience, intended devices, and defined success criteria.
- The use case must have go-to-production intent; meaning that if the use case is deemed successful in a Private Preview experience, the customer will commit to transitioning the use case to production.
- Customers must be willing to upgrade platform releases to receive new or updated functionality.
- Customers must have an early adopter spirit.

Interested customers can learn more about the BrowserUX initiative by engaging their Customer Success Manager who will arrange a meeting with the OneStream product team.

## **Private Preview Program**

OneStream Private Previews are intended to extend pre-General Availability platform features or solutions to customers for non-production validation and feedback. Private Previews may be OneStream hosted, or installed to customer self-hosted or cloud environments. They are managed by the Product and Engineering team and there is no commitment to issue resolution nor support through OneStream's normal support ticketing process.

All OneStream BrowserUX initiative customer engagements commence with a Private Preview experience. The agreed upon use case is validated in a non-production instance with a targeted audience and defined success criteria.

## **Limited Availability Program**

OneStream Limited Availability programs are for early adopting customers to operate new functionality in their Production instance, under OneStream's full Service Level Agreement (SLA). Features and solutions in Limited Availability are supported by the normal Support ticketing process.

Features or Solutions in this program are deemed "Limited" because either the intended functionality is not yet complete, or OneStream is throttling the adopting customers to ensure successful learning and support across the OneStream and Partner communities.

Successful BrowserUX Private Preview experiences are eligible for transition to Production under the Limited Availability program. OneStream is looking to establish BrowserUX success in the market through Limited Availability before considering a General Availability launch.

The release of 8.1 BrowserUX entered into Limited Availability. For 8.2, BrowserUX is remaining in Limited Availability and still seeking customers and partners to participate in the program.

Customers upgrading to v8+ releases are provided the option to have BrowserUX enabled in their Non-Production and Production instances.

## **General Availability Launch**

The culmination of our efforts is the General Availability launch. At this point, the product is made available to our entire customer base. General Availability marks the official release, showcasing the enhanced capabilities of BrowserUX. The team continues supporting and enhancing the product after BrowserUX is made generally available.

# New in BrowserUX 8.2

BrowserUX 8.2.0 introduces a variety of new features across the platform, which compliment earlier delivered functionality to enable a wider range of end users needs.

BrowserUX releases features significant enhancements to the User Experience. Release 8.2 continues to build in the Workflow and Dashboard areas to ensure a cohesive experience for existing Windows Application users.

## Workflow

Feature	Description
Dependent Actions	Lock/Unlock Descendants, Corporate Certification Management, and Corporate Data Control are now available in the Workflow Status menu.
Multi-Period Processing	Execute batch actions across multiple periods. Accessible in the Workflow context menu.
Grid Actions Moved to Context Menus	Formerly accessed in Right-Click menus, Grid Actions are now available in the Grid context menu to support a smoother experience on touch devices.
Grid Keyboard Functionality	Enabled keyboard navigation on Grid types throughout the system. Users have access to directional keys as well as Enter and Tab.
Workflow Navigation	Quickly navigate between Workflow Steps with a dropdown menu in the page title bar.
Journal Export	Export journals from the Journals workflow toolbar to an XLSX import template file for the current workflow profile and scenario. This is useful when you want to import journals into another application, scenario, or workflow profile without needing a business rule or having to navigate to another page.
Add Journal Line Items	You can specify exactly where to insert a new line item in a journal. Insert a journal line item by selecting an existing line item then clicking the Add

## New in BrowserUX 8.2

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Feature	Description
	Line Item button. This adds a new line item directly below the selected one. Prior to this enhancement, all new journal line items were placed at the top of the journal by default. If you do not select a location for a new line item, it will be added to the top of the journal.
Rename Journals	You can rename journal entries in Working or Rejected status. In the DesktopApp, renaming a journal requires you to launch a <b>Rename Journal</b> dialog. In BUX, the journal name property is editable, and changes are saved as part of the standard Save action.
Filter Journals By Entity	You can filter journal entries on the entity name using the <b>Filter</b> button in the <b>Journals</b> tool bar. You can use this filter in combination with grid column filters. Filtering helps auditors, accountants, and other stakeholders, quickly identify specific transactions and reduces the time spent on searching for information, especially when investigating entries.
Personalize Journal Line Item Dimension Member Descriptions	You can hide or show member descriptions next to member names in journal line items. Preferences are saved in your local browser.
Enhanced Error Display for Journal Validation	When validating journals, detected validation errors are prominently displayed in a Validation Messages pane. This update aligns with the Desktop App method of validation error presentation, ensuring a consistent and clean user experience.
SQL Table Editor Row Background Color	Administrators have the option to apply a background color to all rows or alternate rows of an SQL table in SQL Table Editor grids. This makes it easier to distinguish between rows of data at a glance, and can significantly reduce eye strain.

## Dashboard

Feature	Description
Advanced Charts	Area, Bar, Line, Pie and Donut Charts
Large Data Pivot Grid	Supports existing Large Data Pivot Grid components in Dashboards while offering extended functionality.
Pivot Grid	Supports existing Pivot Grid components in Dashboards while offering extended functionality.
Date Selector	Provides a configurable calendar for Dashboards that enables users to select a date
SQL Table Editor - Filter Row	Optional configuration that allows users to filter in a specialized Filter Row directly beneath column headers.
SQL Table Editor & Grid View - Keyboard Functionality	Optional configuration that allows users to filter in a specialized Filter Row directly beneath column headers. Users have access to directional keys as well as Enter and Tab.

## Functional Capabilities

Cancel Long-Running Tasks	If a Cube View takes longer than 10 seconds to render, users will be prompted to choose to cancel the task or continue processing. Users can cancel this task from the Data Explorer page or Task Activity panel. The Task Activity panel also now includes filters to display long-running tasks and was updated to ensure it provides proper task statuses upon cancellation and logging detail for Cube Views.
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# BrowserUX Implementation

This section will guide you through the prerequisites for BrowserUX implementation and the steps for setup and configuration.

## Prerequisites for BrowserUX Implementation

Customers must have OneStream Platform version 8.0 or later installed in their environments. For more information on the installation process, see the [Installation Guide](#).

For information on prerequisites for self-hosted environments, refer to the Legacy Authentication section in the [Upgrade Guide for BrowserUX](#) guide.

## System Requirements

Supported operating systems:

- Microsoft Windows 10 and 11
- macOS
- iOS
- Android

**NOTE:** MacOS, iOS, and Android OS version compatibility are being evaluated during the Private Preview program.

Supported browsers:

- Microsoft Edge
- Google Chrome
- Apple Safari

# Setup and Configuration

The setup and configuration of OneStream BrowserUX may vary based on how your environments are hosted. Follow the instructions below that apply to your environment setup.

The BrowserUX URL structure uses a company domain. For example <https://cloudsitename.onestreamcloud.com/>. This URL can run on Chrome, Edge, and Safari browsers.

**NOTE:** This URL is different from the ClickOnce URL, which allows users to run an instance of the OneStream Windows Client remotely from an application server. ClickOnce URLs can only run in an Edge browser.

## Authentication

For OneStream hosted environments, OneStream IdentityServer (OIS) technology enables BrowserUX users to authenticate through a browser and enables administrators to set up BrowserUX environments to use native IDs or an identity provider (IdP). For more information on authentication using OIS, see the [Identity and Access Management Guide](#).

For self-hosted environments, users can authenticate into BrowserUX using their existing authentication method. Additional instructions for self-hosted authentication can be found in the [Installation Guide](#) and [BrowserUX Upgrade Guide](#).

# Functional Capabilities of BrowserUX

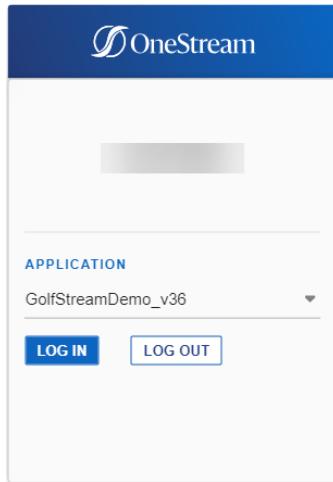
Learn how to navigate OneStream BrowserUX. This section explores general features and highlights notable differences between BrowserUX and Windows Application.

## General User Experience

### Log in to BrowserUX

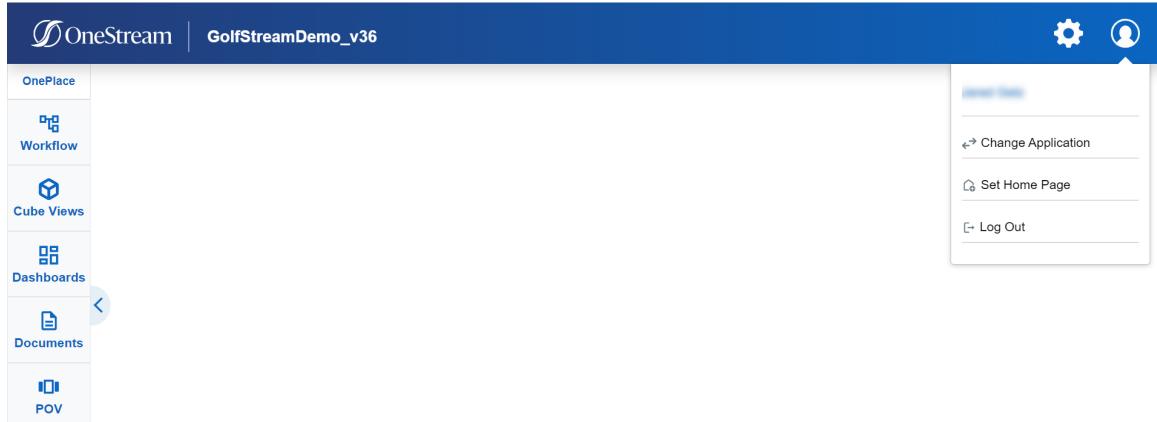
BrowserUX is accessed through a web browser instead of using a Windows shortcut or ClickOnce to open a local instance of OneStream. You can use bookmarked URLs to navigate to BrowserUX. Once successfully authenticated, you can select an application from the drop-down menu and click the **LOG IN** button to access OneStream.

BrowserUX is accessed through a custom URL. For example, <https://cloudsitename.onestreamcloud.com/>. To start the authentication process, input a Username and select Next. Once authenticated, BrowserUX will display a OneStream Home Page or, if multiple Applications are available, an Application Selector.

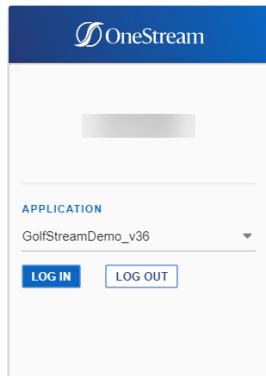


# Log out of BrowserUX

1. In the **User Menu**, select **Log Out**, or



2. On the **Application Selection** page, click the **LOG OUT** button, or



Logging off of BrowserUX will not log off other open OneStream instances, such as the Windows Client or Excel Add-In. If using single sign-on, the user will not be logged out of your single-sign on session.

# Change Applications

To change applications, select **Change Applications** from the **User Menu**. The Application Selector will be displayed with available applications.

# Header

BrowserUX has a header and a OnePlace panel that persist throughout the user experience. Similar to the Windows Application, the header has a Home button embedded in the OneStream logo and displays the Application Name. Other header functionality has been moved to two menus in the top right corner of the screen.

-  **Gear Icon** – Application Name, Global POV, Version Number, Help Documentation, Task Activity, File Explorer
-  **User Icon** – User's Name, Change Application, Set/Clear Home Page, Log Out

The OnePlace Panel can be fully collapsed, opened to display Navigation controls, or expanded as an overlay when working with any of the menu areas.

**NOTE:** The OnePlace panel may be fully hidden for certain users using security settings.

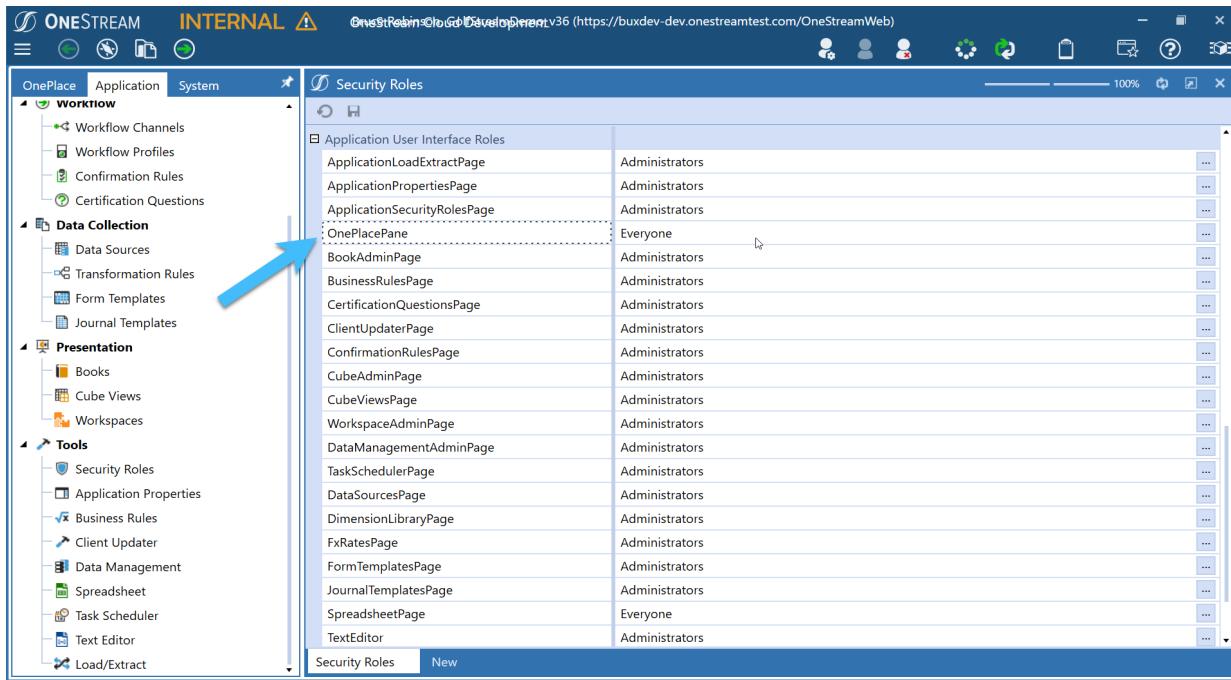


## OnePlace Panel

### Hide OnePlace Panel

The OnePlacePanel security role can be used to hide the Navigation panel in BrowserUX. This configuration has been added under Security Roles to enable or disable end user access to the OnePlace navigation panel.

## Functional Capabilities of BrowserUX

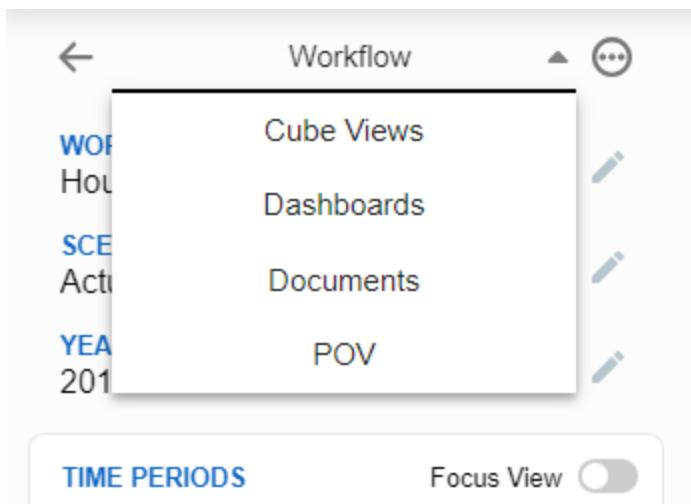


The screenshot shows the OnePlace panel with the 'Data Collection' section expanded. A blue arrow points to the dropdown menu icon at the top of this section. The right panel displays a table of 'Security Roles' for various pages, with the 'OnePlacePage' role highlighted.

Page	Role
ApplicationLoadExtractPage	Administrators
ApplicationPropertiesPage	Administrators
ApplicationSecurityRolesPage	Administrators
OnePlacePage	Everyone
BookAdminPage	Administrators
BusinessRulesPage	Administrators
CertificationQuestionsPage	Administrators
ClientUpdaterPage	Administrators
ConfirmationRulesPage	Administrators
CubeAdminPage	Administrators
CubeViewsPage	Administrators
WorkspaceAdminPage	Administrators
DataManagementAdminPage	Administrators
TaskSchedulerPage	Administrators
DataSourcesPage	Administrators
DimensionLibraryPage	Administrators
FxRatesPage	Administrators
FormTemplatesPage	Administrators
JournalTemplatesPage	Administrators
SpreadsheetPage	Everyone
TextEditor	Administrators

## Navigate OnePlace Panel Sections

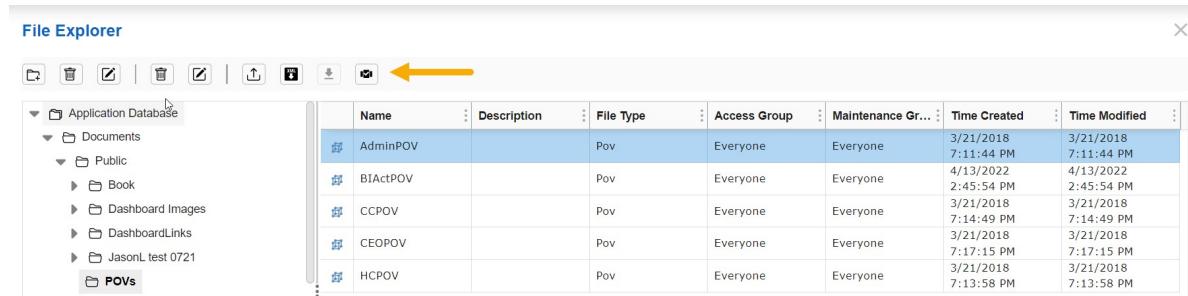
In the expanded OnePlace panel, there is a drop-down menu at the top of each area to navigate between them.



The screenshot shows the OnePlace panel with the 'Workflow' section expanded. A dropdown menu is open, listing 'Cube Views', 'Dashboards', 'Documents', and 'POV', each with a pencil icon for editing.

## File Explorer

File Explorer is used to manage all OneStream files and saved POVs. All file actions are available in the toolbar, including create, edit, delete, upload, download, and apply POV.

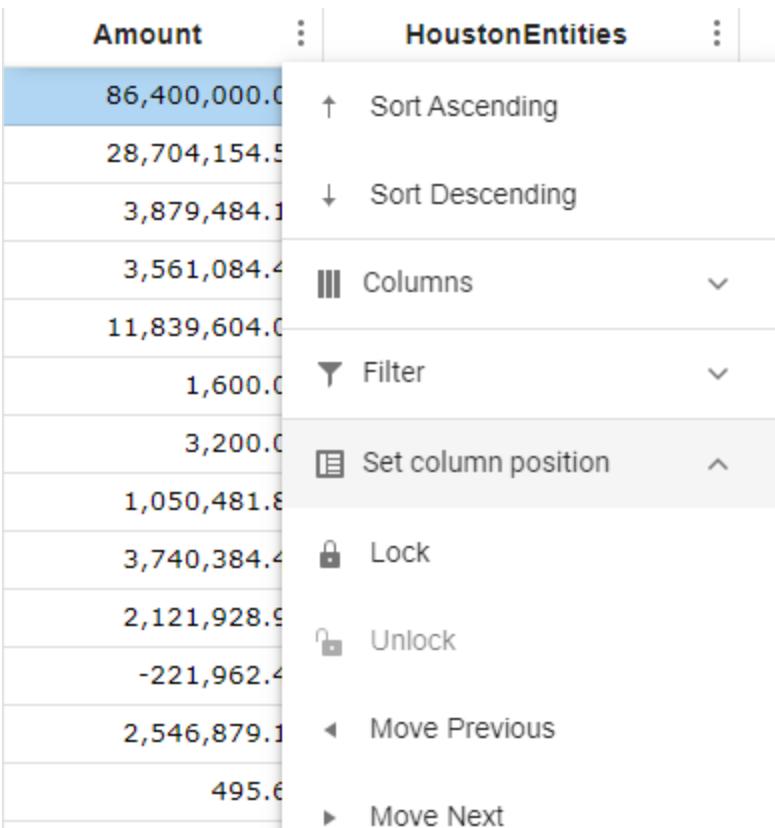


## Grids

While the BrowserUX grids offer the same functionality as the Windows Client, some differences were added to improve the user experience. Many of the grids have virtual scrolling instead of paging to handle large datasets. In addition to the Sorting, Filtering, and Column controls found in the Windows Client, BrowserUX has added a column Lock feature, which allows users to lock in place any column and the columns to its left, while being able to scroll the remaining columns horizontally. In the header, BrowserUX has added an AutoFit button, which will automatically fit all the column widths. Many of the grids will also have a context menu button  in the left corner of the grid header with additional functionality.

## Functional Capabilities of BrowserUX

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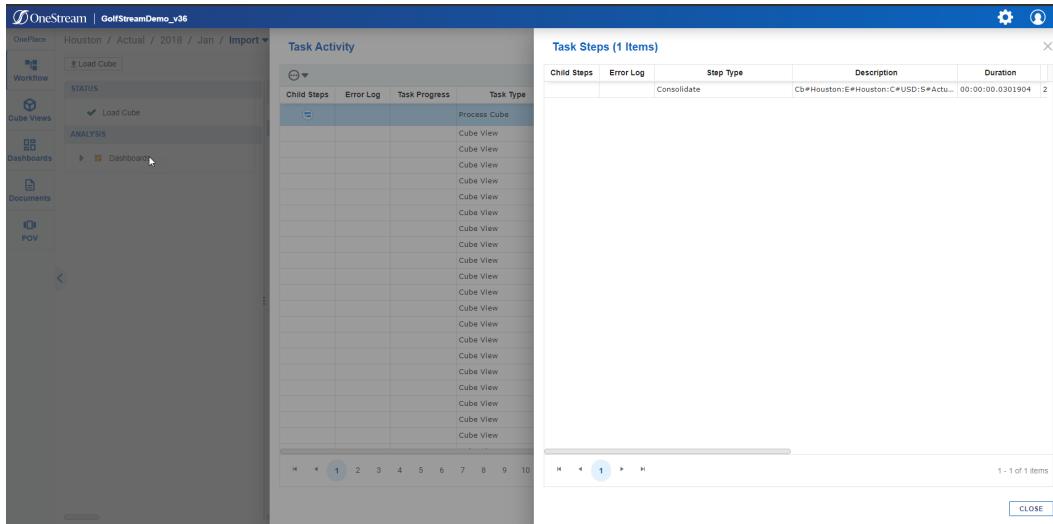


## Anchored Dialogs

Many of the dialog boxes in BrowserUX display in a slide-out panel anchored to the right side of the page instead of the floating dialogs used in the Windows Client. This paradigm offers improved visibility and provides consistency for users accessing BrowserUX from various devices. Slide-out panels can be expanded or constricted to suit user preference by dragging the left edge horizontally across the page.

## Functional Capabilities of BrowserUX

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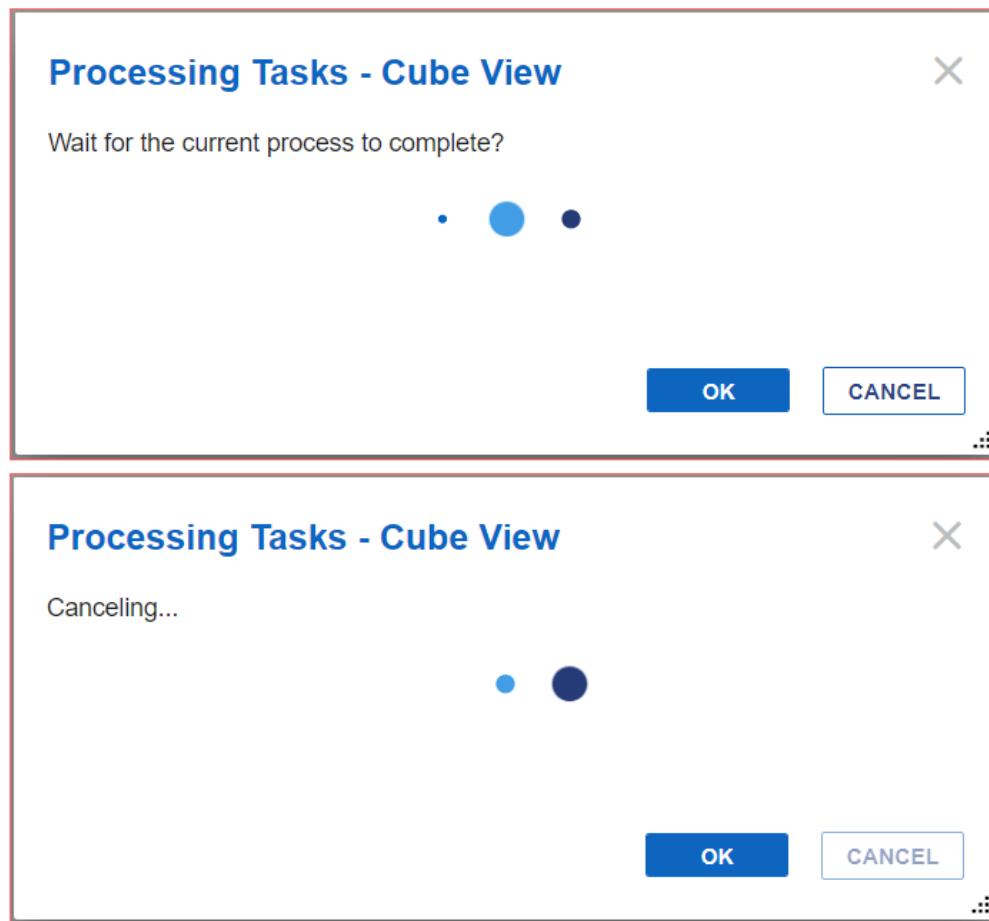
This anchored dialog box has been extended to dashboards that appear in dialog boxes. There is a larger default width compared to the Windows Client, but the width can be altered with the dialog box display format configurations. Since these dialog boxes are always the full height of the screen, the height configuration for dashboards in dialog boxes is ignored in BrowserUX.

## Cancel Long-Running Tasks

The ability to cancel long-running tasks in OneStream provides users and administrators with an enhanced level of control over a variety of OneStream processes, such as loading and exporting large cube views, uploading files, running data management jobs, and more. A new dialog has been implemented to support this functionality and a button has been added to the Task Activity grid to enable users to open the Task Progress dialog and cancel tasks. Filters have also been added to the Task Activity panel to limit data to running tasks and to allow administrators to see task data for all users.

## Functional Capabilities of BrowserUX

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# Workflow

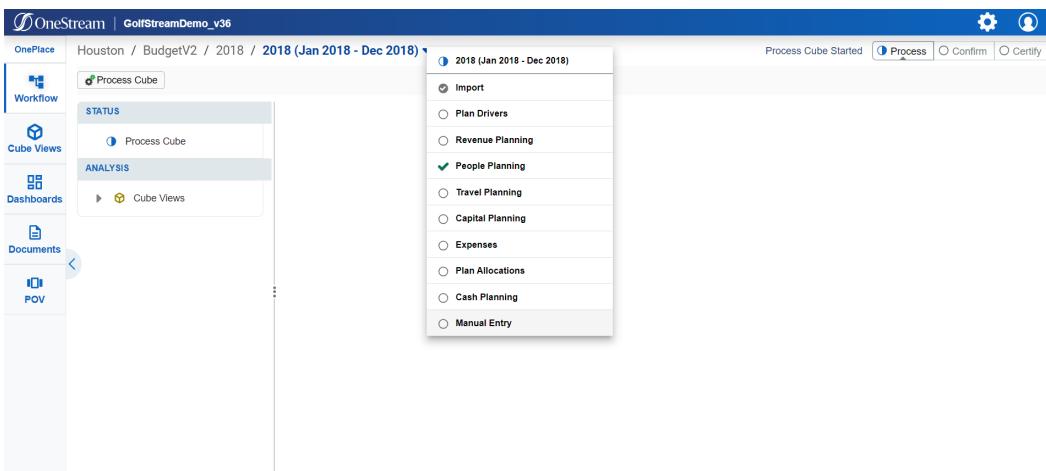
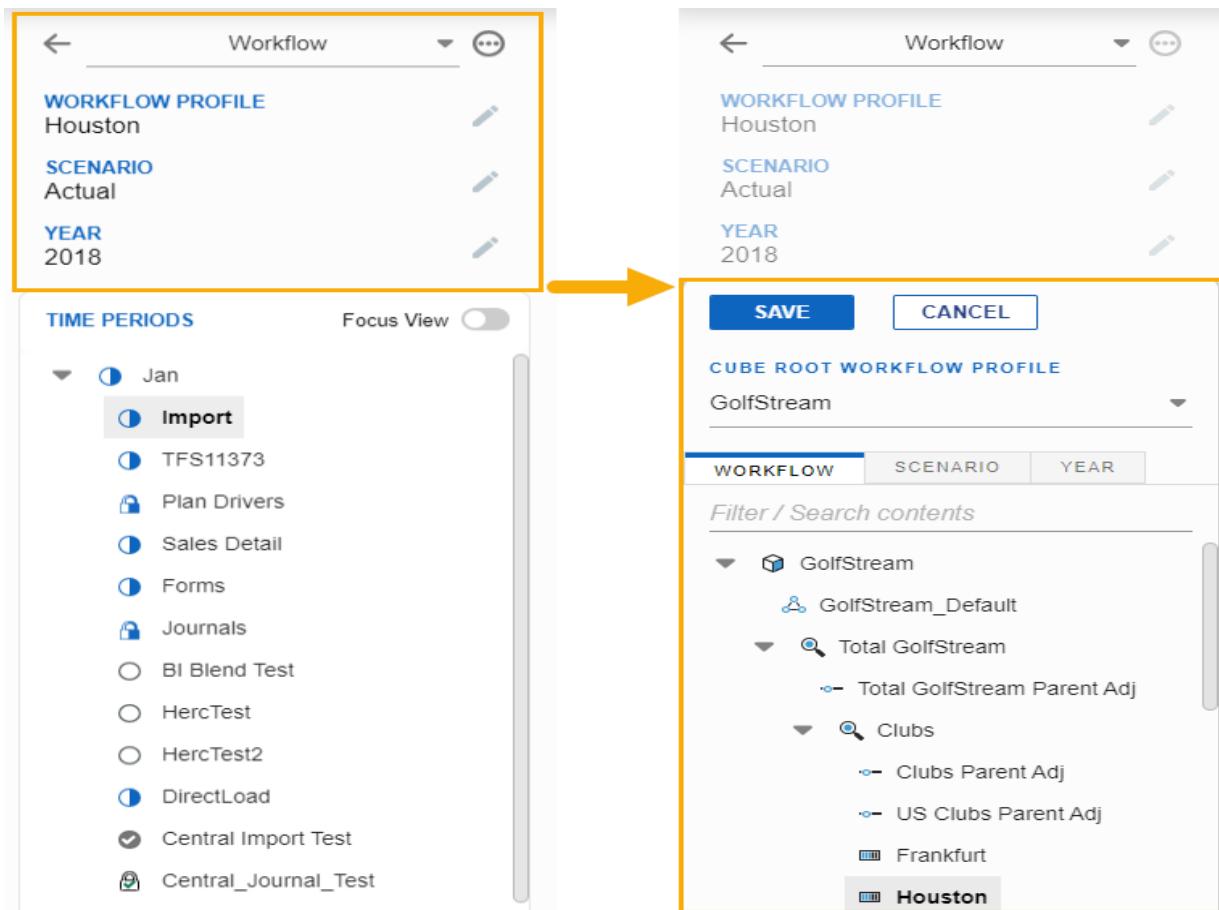
Workflow in BrowserUX delivers the same functionality and customizations offered in the Windows Application with a few notable exceptions mentioned below. Some tactical user experience improvements have been made, while primarily focusing on delivering the functionality of the workflow steps.

## Navigation

Similar to the Windows Application, Workflows are accessed through the OnePlace panel. Users are able to modify the Workflow POV by selecting the edit icon next to each dimension and navigate between Workflow Units under Time Periods. It is important to note a few differences between BrowserUX and the Windows Application:

- The Workflow POV Edit menu is displayed as an overlay menu, instead of a pop-up dialog. Users are able to update Workflow, Scenario, and Year using the available tabs. A Save button at the top of the section finalizes any changes.

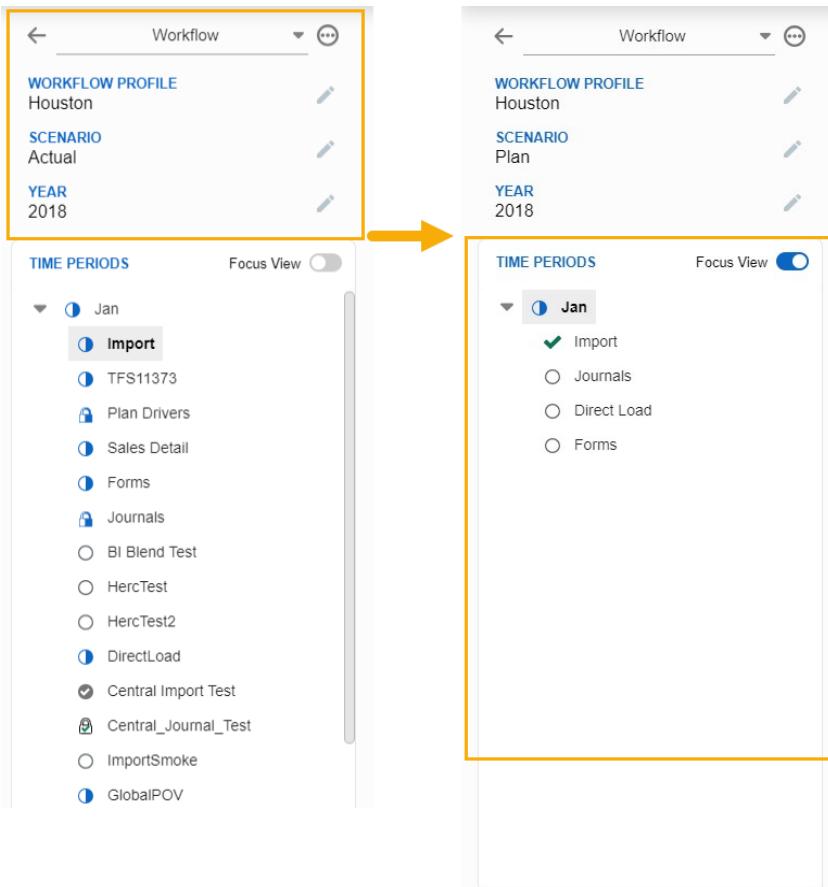
## Workflow



## Workflow

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- A new dropdown in the Workflow page title bar allows users to quickly toggle between Workflow Steps in a Time Period.
- The new **Focus View** function allows users to view only the selected time period. In the example below, a user chose to view only June to simplify navigation. To return to the full list, simply disable the **Focus View** toggle.



Status Icons have been updated, and in some cases, combined to make a more intuitive user experience.

## Workflow

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Label	Windows Application	Browser UX
Complete	●	✓
Disabled	○	∅
Error	●	!
In Progress	●	●
Input Form Started	●	●
Last Step Complete	●	●
Last Step Disabled	○	∅
Last Step Error	●	!
Last Step in Progress	●	●
Optional Workflow Complete	✓	✓
Completed and Closed	●	●
Completed and Locked	●	●
Incomplete Closed	●	●
Incomplete Locked	●	●

# Supported Workflow Functionality

## Workflow Steps

- Blend
- Central Form Input
- Central Import
- Central Journal Input
- Certify
- Confirm
- Direct
- Form
- Import
- Journal Input
- Load
- Pre-Process
- Process
- Validate
- Workspace

## General Workflow Functionality

- Drill Back
- Drill Down
- Analysis Area
- Application Configurations
- Time Range Periods
- View Transformation Rules
- View Processing Log
- View Source Document

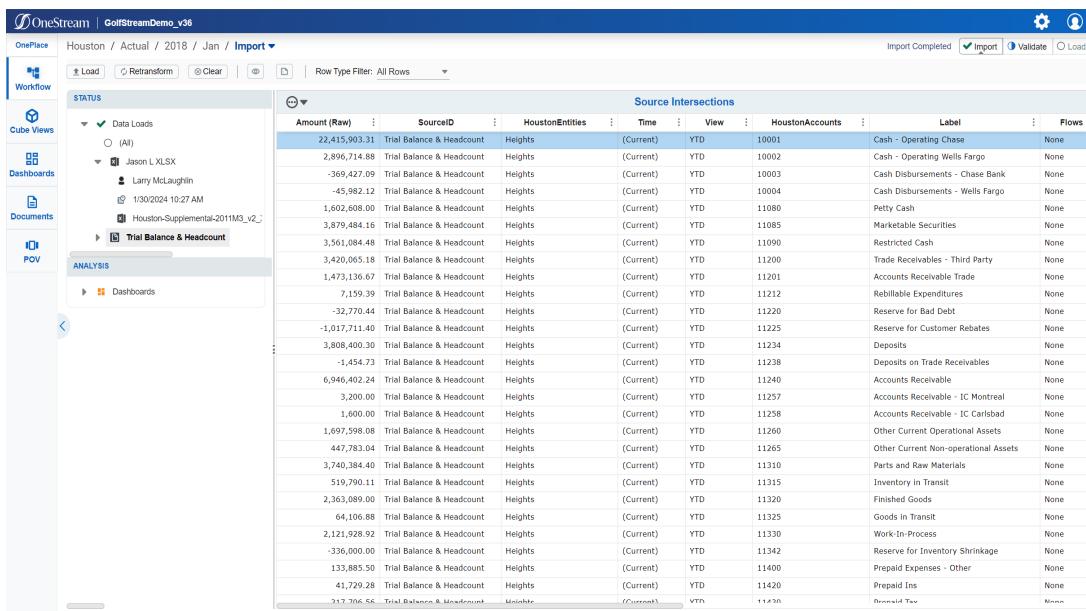
## Workflow

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- Intercompany Matching
- Multi-Period Processing
- Time Period Actions
- Dependent Actions

# Notable Differences from Windows Application

- Workflow Page Styling – Workflow Title, Workflow Steps, Grids, Status Area, and Analysis Area.



The screenshot shows the OneStream Workflow page for the 'GolfStreamDemo\_v36' environment. The top navigation bar includes 'OnePlace', 'Houston / Actual / 2018 / Jan / Import ▾', and 'Import Completed' with status 'Import' (checked). The left sidebar has 'Workflow' selected, with 'Data Loads' expanded to show 'Jason L.XLSX' and 'Houston-Supplemental-2011M3\_v2.x'. The main area has 'STATUS' and 'ANALYSIS' tabs. The 'ANALYSIS' tab is active, displaying a grid titled 'Source Intersections' with columns: Amount (Raw), SourceID, HoustonEntities, Time, View, HoustonAccounts, Label, and Flows. The grid contains numerous rows of financial data, such as '22,415,903.31 Trial Balance & Headcount Heights (Current) YTD 10001 Cash - Operating Chase None', and various other categories like 'Marketable Securities', 'Restricted Cash', and 'Accounts Receivable'. Status icons are present in the top right of the main area.

- Status Icons – Consistent with the OnePlace panel, the Workflow status icons have been simplified in BrowserUX to make a more intuitive user experience.

## Workflow

- Workflow Progress Buttons – Now displayed on the right side of the screen, the progress buttons have been updated with new icons and borders to improve visibility.

Drag and Drop File Import – Files can be imported by selecting from your device or using a new drag & drop feature.

- Context Menus for Grids – All Workflow Grid functions have been moved from right-click menus to a context menu in the header of each grid.

- Rename Journal – You can rename journals by editing the Journal Name property in the journal header, instead of a rename button and dialog.

# Notable Workflow Functionality Gaps

## Workflow Steps

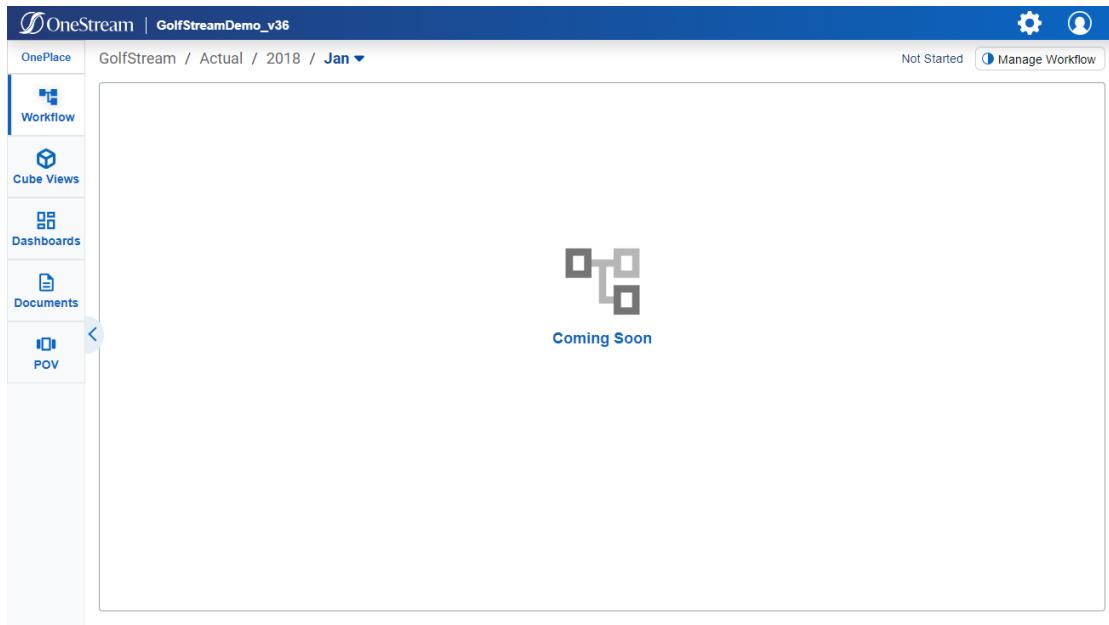
- Manage Workflow

## General Workflow Functionality

- Edit Transformation Rules
- Spreadsheet Form Input

## Navigating Workflow Step Gaps

Helpful tips have been added to BrowserUX to identify unsupported workflow steps for both dashboard designers and end users. In BrowserUX, *Coming Soon* icons indicate a workflow step is not currently supported.



Even if all steps are supported in each workflow, thorough testing is still recommended to ensure processes are working as expected before production use.

# Cube Views

BrowserUX cube views are flexible reporting artifacts that enable cube data to be presented and customized in numerous ways using various configurations and formatting properties, member formulas, and calculations.

Nearly all cube view features provided in the Windows Client are available to users in BrowserUX. For cube views that utilize features or functionality that has not been delivered, or in the case that variations arise due to technical differences inherent in web applications, there may be configuration changes or other workarounds that can be leveraged until subsequent releases close the functional gaps.

## Supported Cube View Functionality

### Presentation

- Cube View and Export Format Configuration Properties
- Cell Data Types
- Cell Status Background Colors
- Row and Column Sharing
- Nested and Expandable Column and Row Headers

### Toolbar Functions

- Context Menu Dropdown
- Save and Revert Changes
- Data Refresh
- Parameter Selection

## Cube View and Cell-Level Context Menu Functions

- Calculate, Translate, Consolidate
- Data Attachments
- Spreading
- Cell Detail
- Cell POV Information
- Data Unit Statistics
- Cell Status
- Drill Down
- Row Suppression
- Export
- Cube View and Dashboard Navigation Links

## Cube View Navigation

The General Visibility setting in Cube View profiles will be applicable for cube views in BrowserUX and the Windows Client (OnePlace, Workflow, and Dashboards). The Client/Device Visibility setting in Dashboard profiles will also affect access to embedded cube views or data explorer components in Dashboards. See [Dashboards](#).

## Cube View Drill Down

The Drill Down interface has been moved from a page tab into a slide-out panel in BrowserUX. You can drill down into cube data from a cell intersection by right-clicking the cell and selecting **Drill Down** from the cube view context menu. The cube view drill down interface opens in a slide-out panel, which can be resized horizontally.

Currently, only the **Open** in Panel option is supported. The **Open** in New Tab option will be considered in a future release.

## Cube Views

OnePlace | GolfStreamDemo\_2022

Cube Views / Statement of Cash Flow Final

Spain

Net Income (Loss) 8,728,964.19 USD

Adjustments for Depreciation and Amortization 23,031.80 USD

Decrease (Increase) in accounts receivable -1,554,570.01 USD

Decrease (Increase) in inventory

Increase (decrease) in liabilities (A/P, taxes payable) 64,433.68 USD

Increase (decrease) in other operating activities

Cash provided by operating activities 7,261,859.66 USD

Capital Expenditures -15,847.89 USD

Investments

Other cash flows from investing activities

Net cash from (used in) investing activities -15,847.89 USD

Dividends Paid

Sale (repurchase) of stock 1,202,571.61 USD

Increase (decrease) in debt 62,188.11 USD

Other cash flows from financing activities

Capital Lease Principal Payment -25,312.48 USD

Net cash from (used in) Financing activities 1,239,447.24 USD

Net Increase (Decrease) in Cash and Cash Activity 8,485,459.01 USD

Drill Down - Statement of Cash Flow Final

Drill Down History

Amount	Cube	Entity	Parent	Consolidation	Scenario	Time	View	Account	Flow	Origin
23,031.80	CashFlow	Spain		USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	StatementChange - StatementChange	Top
23,031.80	CashFlow	Spain		USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	StatementChange - StatementChange	Top
9,647.03	CashFlow	Valencia - Valencia	Spain	EUR	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	StatementChange - StatementChange	Top
23,031.80	CashFlow	Spain		USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	StatementChange - StatementChange	Top
23,031.80	CashFlow	Spain		USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	CF_Activity - Cash Flow Activity	Import

Results For Most Recent Drill Down

Amount	Cube	Entity	Parent	Consolidation	Scenario	Time	View	Account	Flow	Origin	IC
-76,189.09	CashFlow	Spain	USD	Actual	2022M1	YTD	Balance - Balance		None	Import	Nor
8,728,964.19	CashFlow	Spain	USD	Actual	2022M1	YTD	CF_NetInc - Net Income (Loss)	CF_Activity - Cash Flow Activity	Import	Nor	
24,020.15	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	EndBal_Calc - Ending Balance Calculated	Import	Nor	
-1,902.82	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	FX_CurMvmt	Import	Nor	
0.00	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	FX_Hist	Import	Nor	
-807.07	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	FX_Open	Import	Nor	
8,601.46	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	BegBal_Calc - Beginning Balance Calc	Import	Nor	
23,031.80	CashFlow	Spain	USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	CF_Activity - Cash Flow Activity	Import	Nor	
25,312.48	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	Capital_Lesses - Capital Leases Acquired	Import	Nor	
152.40	CashFlow	Spain	USD	Actual	2022M1	YTD	GA - General & Administrative Expenses	None	Import	Nor	
93.07	CashFlow	Spain	USD	Actual	2022M1	YTD	Restricted Cash - Restricted Cash	FX_CurMvmt	Import	Nor	
15,847.89	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	Capital_Spending	Import	Nor	
-23,031.80	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	Depr_Amort - Current Depr / Amort	Import	Nor	
0.00	CashFlow	Spain	USD	Actual	2022M1	YTD	Restricted Cash - Restricted Cash	FX_Hist	Import	Nor	
-18,175.83	CashFlow	Spain	USD	Actual	2022M1	YTD	Land - Land	FX_CurMvmt	Import	Nor	
0.00	CashFlow	Spain	USD	Actual	2022M1	YTD	Land - Land	FX_Hist	Import	Nor	

1 - 50 of 102 items

CLOSE

A context menu was also added to the toolbar on the Drill Down page to consolidate some functionality in a way that better supports different screen sizes and devices.

OnePlace | GolfStreamDemo\_2022

Cube Views / Statement of Cash Flow Final

Spain

Net Income (Loss) 8,728,964.19 USD

Adjustments for Depreciation and Amortization 23,031.80 USD

Decrease (Increase) in accounts receivable -1,554,570.01 USD

Decrease (Increase) in inventory

Increase (decrease) in liabilities (A/P, taxes payable) 64,433.68 USD

Increase (decrease) in other operating activities

Cash provided by operating activities 7,261,859.66 USD

Capital Expenditures -15,847.89 USD

Investments

Other cash flows from investing activities

Net cash from (used in) investing activities -15,847.89 USD

Dividends Paid

Sale (repurchase) of stock 1,202,571.61 USD

Increase (decrease) in debt 62,188.11 USD

Other cash flows from financing activities

Capital Lease Principal Payment -25,312.48 USD

Net cash from (used in) Financing activities 1,239,447.24 USD

Net Increase (Decrease) in Cash and Cash Activity 8,485,459.01 USD

Drill Down - Statement of Cash Flow Final

Drill Down History

Amount	Cube	Entity	Parent	Consolidation	Scenario	Time	View	Account	Flow	Origin
23,031.80	CashFlow	Spain	USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	StatementChange - StatementChange	Top	
23,031.80	CashFlow	Spain	USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	StatementChange - StatementChange	Top	
9,647.03	CashFlow	Valencia - Valencia	Spain	EUR	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	StatementChange - StatementChange	Top
23,031.80	CashFlow	Spain	USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	CF_Activity - Cash Flow Activity	Import	

Results For Most Recent Drill Down

Amount	Cube	Entity	Parent	Consolidation	Scenario	Time	View	Account	Flow	Origin	IC
-76,189.09	CashFlow	Spain	USD	Actual	2022M1	YTD	Balance - Balance		None	Import	Nor
8,728,964.19	CashFlow	Spain	USD	Actual	2022M1	YTD	CF_NetInc - Net Income (Loss)	CF_Activity - Cash Flow Activity	Import	Nor	
24,020.15	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	EndBal_Calc - Ending Balance Calculated	Import	Nor	
-1,902.82	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	FX_CurMvmt	Import	Nor	
0.00	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	FX_Hist	Import	Nor	
-807.07	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	FX_Open	Import	Nor	
8,601.46	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	BegBal_Calc - Beginning Balance Calc	Import	Nor	
23,031.80	CashFlow	Spain	USD	Actual	2022M1	YTD	CF_DEPRAMORT - Adjustments for Depreciation and Amortization	CF_Activity - Cash Flow Activity	Import	Nor	
25,312.48	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	Capital_Lesses - Capital Leases Acquired	Import	Nor	
152.40	CashFlow	Spain	USD	Actual	2022M1	YTD	GA - General & Administrative Expenses	None	Import	Nor	
93.07	CashFlow	Spain	USD	Actual	2022M1	YTD	Restricted Cash - Restricted Cash	FX_CurMvmt	Import	Nor	
15,847.89	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	Capital_Spending	Import	Nor	
-23,031.80	CashFlow	Spain	USD	Actual	2022M1	YTD	Furniture - Furniture	Depr_Amort - Current Depr / Amort	Import	Nor	
0.00	CashFlow	Spain	USD	Actual	2022M1	YTD	Restricted Cash - Restricted Cash	FX_Hist	Import	Nor	
-18,175.83	CashFlow	Spain	USD	Actual	2022M1	YTD	Land - Land	FX_CurMvmt	Import	Nor	
0.00	CashFlow	Spain	USD	Actual	2022M1	YTD	Land - Land	FX_Hist	Import	Nor	

1 - 50 of 102 items

CLOSE

A hidden context menu for drill down has been implemented to consolidate key drill down functions, such as Load Results for Imported Cell and Audit History for Forms or Adjustment Cells.

## Cube Views

The screenshot shows the OneStream interface with the title 'Cube Views / Statement of Cash Flow Final'. The main area displays a table of financial data for Spain, including Net Income (Loss), Adjustments for Depreciation and Amortization, and various cash flow activities. A 'Drill Down History' overlay is open, showing a detailed breakdown of the 'CF\_DEPRAMORT - Adjustments for Depreciation and Amortization' line item. The history table includes columns for Amount, Cube, Entity, Parent, Consolidation, Scenario, Time, View, Account, Flow, and Origin. The overlay also includes sections for 'Results For Most Recent Drill Down' and 'Cell POV Information'.

## User Experience Differentiators

In BrowserUX, row and column virtualization has been implemented to efficiently retrieve and render large datasets for cube views. Row and column virtualization retrieves data to display as the user scrolls vertically or horizontally through cube view pages, improving performance of client-side data rendering and enabling a more seamless data review process. Row virtualization occurs in defined Cube View page boundaries.

## Notable Functional Gaps

- Allocation
- Autofit

**NOTE:** BrowserUX uses column widths specified at design time or a default width of 160 pixels when no specific width is defined for a column, or when an asterisk or "Auto" is used to set the width. OneStream will continue to pursue enhancements that better support automatic column width definitions.

# Dashboards

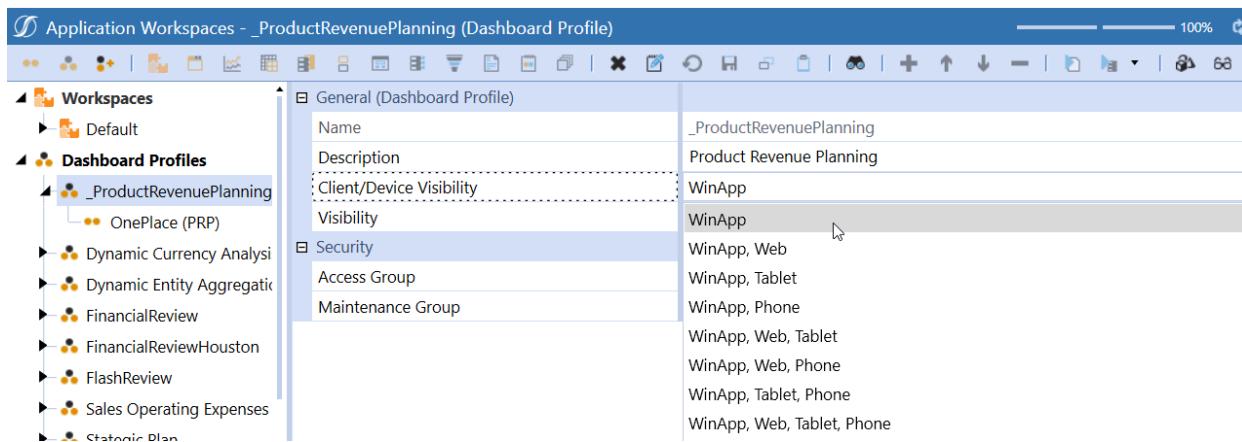
BrowserUX dashboards are expanding functional coverage with the goal of offering equivalent use of layouts and components available in the Windows Client. Currently, the most commonly used features are available in BrowserUX. For dashboards that contain elements that have not been delivered or potential gaps that can arise out of unique design techniques, there are typically substitutions, configuration changes, or workarounds that can be implemented until subsequent releases close the functional gap.

While BrowserUX moves toward comprehensive end user dashboard functionality and matching rendering between the Windows Client and BrowserUX, the underlying technologies between the clients will likely prevent perfect replication of dashboards in both clients. Additionally, since the user interface styling is different between the clients, dashboards designed for one client may look out of place when rendered in another.

If a preexisting dashboard contains only supported layouts and components, it can be enabled for BrowserUX use with a single configuration. However, for an optimized user experience in BrowserUX or on mobile devices, designers may consider modifying the dashboard or creating new client/device specific experiences.

## Enabling Dashboard Access

To ensure dashboards are only rendered within the client (Windows Application or BrowserUX) or device (PC, tablet, or phone), a new configuration has been added to the Dashboard Profile called Client/Device Visibility.



## Dashboards

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The Client/Device Visibility configuration enables dashboard designers to control which dashboard profiles, and the dashboards they contain, can be accessed and viewed on one or more clients and devices. Enabling this configuration will display the dashboard in the OnePlace Dashboard list of the respective client/device selection.

Preexisting and newly created dashboards will be set to the Windows Client only by default. Dashboards are not initially visible in BrowserUX.

# Supported Dashboard Functionality

## Dashboard Layouts

- Grid
- Uniform
- Tabs
- Horizontal Stack Panel
- Vertical Stack Panel

## Dashboard Components

- Advanced Charts
- BI Viewer
- Book Viewer
- Button
- Check Box
- Combo Box
- Cube View
- Data Explorer
- Data Explorer Report
- Date Selector
- Embedded Dashboard
- File Viewer
- Gantt View
- Grid View
- Image
- Label
- Large Data Pivot Grid
- List Box
- Logo
- Pivot Grid
- Radio Button Group
- Report
- Supplied Parameter
- Text Box
- Text Viewer
- Tree View
- SQL Table Editor

## General Dashboard Functionality

- Actions
- Extensible Documents

## Dashboards

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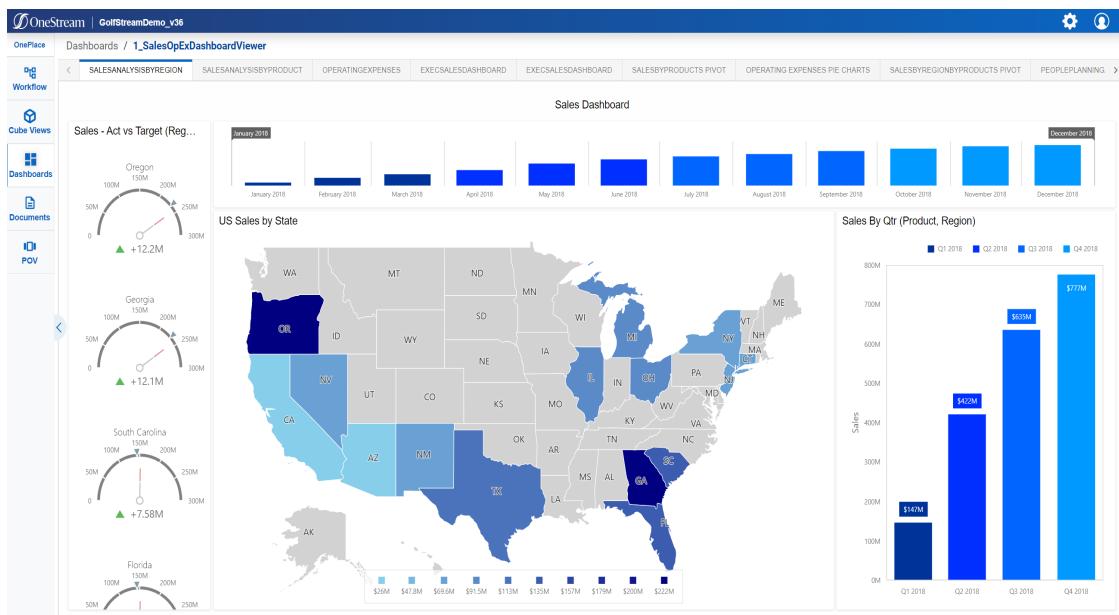
- User Supplied Parameters

# Notable Differences from Windows Application

## Dashboard Components

### BI Viewer

You may observe style differences, like muted borders and headers, or alternative style visualizations.



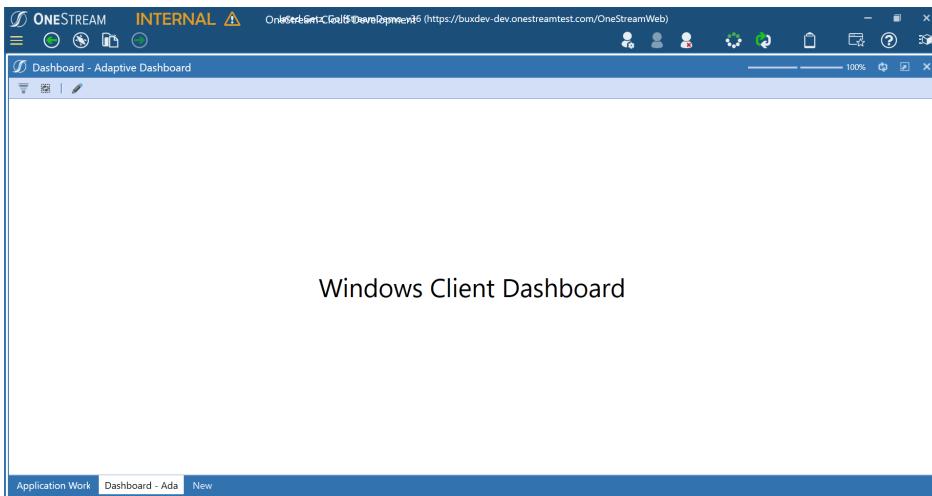
### Embedded Dashboards

New client/device specific dashboards configurations allow a single root dashboard to render different embedded dashboards depending on the client or device type. (More details on the use of this configuration are described within the Multi-Client/Device Dashboard Design Approaches below)

## Dashboards

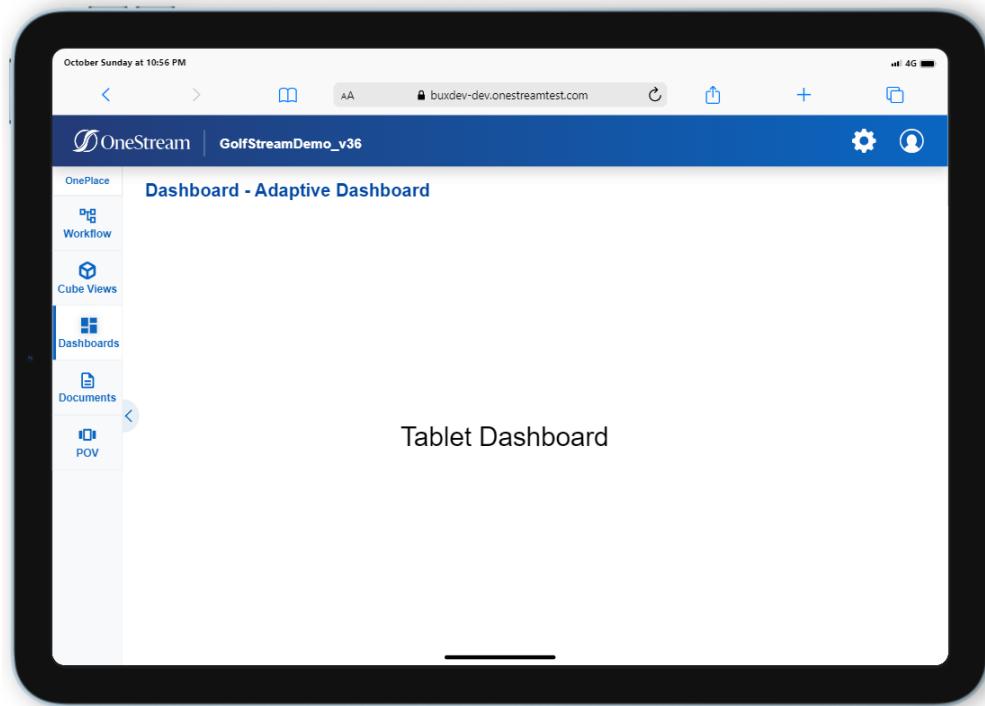
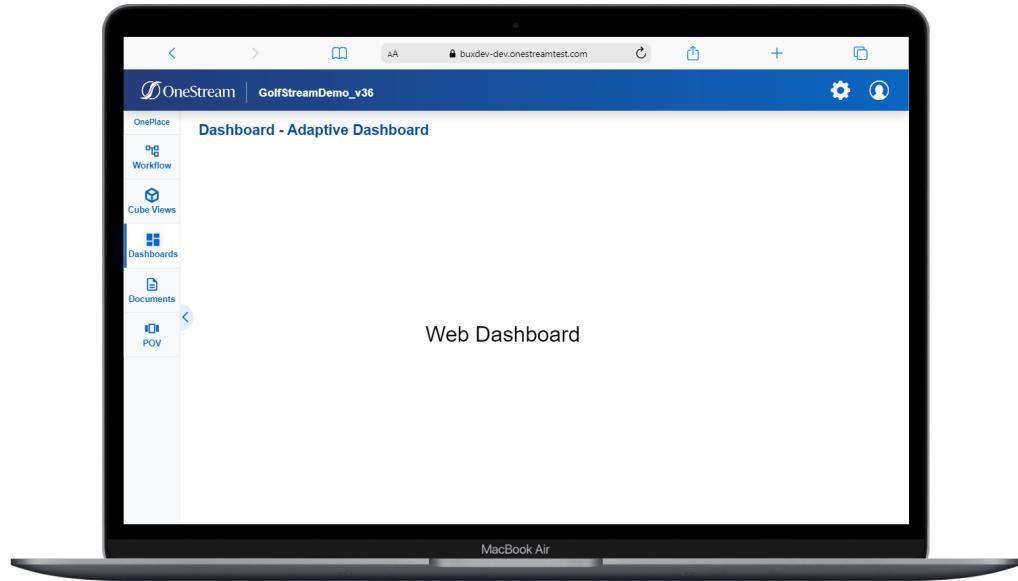
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Component Properties	
General (Component)	
Name	Embedded AdaptiveDashboard
Workspace	Default
Maintenance Unit	AdaptiveDashboardMaintUnit
Description	
Component Type	Embedded Dashboard
Processing	
Template Name Suffix	
Template Parameter Values (e.g., Param1=Value1, ...)	
Text 1	
Text 2	
Embedded Dashboard	
Embedded Dashboard	AdaptiveDashboardWinApp
Embedded Dashboard (override for web)	AdaptiveDashboardWeb
Embedded Dashboard (override for web tablet)	AdaptiveDashboardTablet
Embedded Dashboard (override for web phone)	AdaptiveDashboardPhone
Embedded Custom Control Dashboard	
Instance Name	
Input Parameter Values (e.g., Param1=Value1)	
Event Listeners	(Collection)

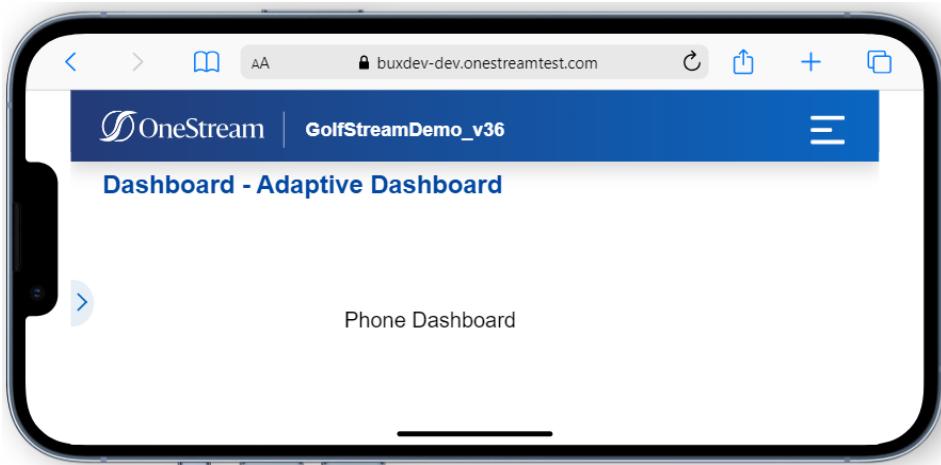


## Dashboards

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## Dashboards



## Grid View

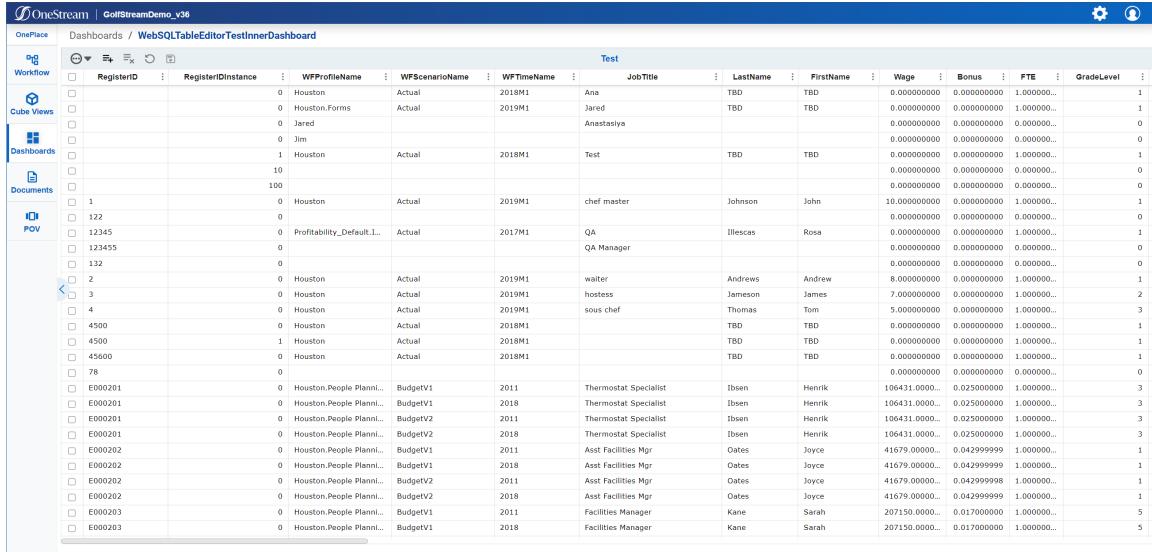
Grid options are now listed in a context menu.

RegisterID	HireDate	JobTitle	Wage	LastName	FirstName
3/3/2022 12:00:00 AM	Ana		0	TBD	TBD
8/4/2022 12:00:00 AM	Jared		0	TBD	TBD
1/1/1900 12:00:00 AM	Anastasiya		0		
1/1/1900 12:00:00 AM			0		
3/3/2022 12:00:00 AM	Test		0	TBD	TBD
1/1/1900 12:00:00 AM			0		
1/1/1900 12:00:00 AM			0		
8/20/2021 12:00:00 AM	chief master		10	Johnson	John
122	1/1/1900 12:00:00 AM		0		
Admin	Texas	12345	8/12/2021 12:00:00 AM	QA	Rosa
		123455	1/1/1900 12:00:00 AM	QA Manager	
		132	1/1/1900 12:00:00 AM		0
Admin	Texas	2	8/20/2021 12:00:00 AM	walter	Andrew
Admin	Texas	3	8/20/2021 12:00:00 AM	hostess	Jameson
Admin	Texas	4	8/20/2021 12:00:00 AM	sous chef	Tom
Admin	Texas	4500	3/3/2022 12:00:00 AM		0
Admin	Texas	4500	3/3/2022 12:00:00 AM		0
Admin	Texas	45600	3/3/2022 12:00:00 AM		0
		78	1/1/1900 12:00:00 AM		0
Facilities	Texas	E000201	1/1/1900 12:00:00 AM	Thermostat Specialist	106431
Facilities	Texas	E000201	1/1/1900 12:00:00 AM	Thermostat Specialist	106431
Facilities	Texas	E000201	12/31/1899 12:00:00 AM	Thermostat Specialist	106431
Facilities	Texas	E000201	1/1/1900 12:00:00 AM	Thermostat Specialist	106431
Facilities	Texas	E000202	1/1/1900 12:00:00 AM	Asst Facilities Mgr	41679
Facilities	Texas	E000202	1/1/1900 12:00:00 AM	Asst Facilities Mgr	41679
Facilities	Texas	E000202	12/31/1899 12:00:00 AM	Asst Facilities Mgr	41679
Facilities	Texas	E000202	1/1/1900 12:00:00 AM	Asst Facilities Mgr	41679
Facilities	Texas	E000203	1/1/1900 12:00:00 AM	Facilities Manager	207150
Facilities	Texas	E000203	1/1/1900 12:00:00 AM	Facilities Manager	207150

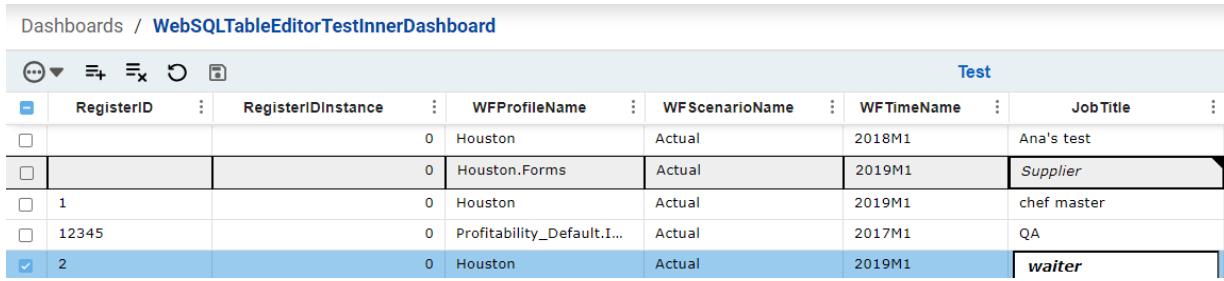
## SQL Table Editor

Additional options are now listed in a context menu. Edited cells have minor style updates.

## Dashboards



Test											
RegisterID	RegisterIDInstance	WFFProfileName	WFScearioName	WFTimeName	JobTitle	LastName	FirstName	Wage	Bonus	FTE	GradeLevel
0	Houston	Actual	2018M1	Ana	TBD	TBD	0.00000000	0.00000000	1.000000...	1	
0	Houston.Forms	Actual	2019M1	Jared	TBD	TBD	0.00000000	0.00000000	1.000000...	1	
0	Jared			Anastasiya			0.00000000	0.00000000	0.000000...	0	
0	Jim						0.00000000	0.00000000	0.000000...	0	
1	Houston	Actual	2018M1	Test	TBD	TBD	0.00000000	0.00000000	1.000000...	1	
10							0.00000000	0.00000000	0.000000...	0	
100							0.00000000	0.00000000	0.000000...	0	
1	Houston	Actual	2019M1	chef master	Johnson	John	10.00000000	0.00000000	1.000000...	1	
122	0						0.00000000	0.00000000	0.000000...	0	
12345	0	Profitability_Default.I...	Actual	2017M1	QA	Illescas	Rosa	0.00000000	0.00000000	1.000000...	1
123455	0				QA Manager		0.00000000	0.00000000	0.000000...	0	
132	0						0.00000000	0.00000000	0.000000...	0	
2	Houston	Actual	2019M1	walter	Andrews	Andrew	8.00000000	0.00000000	1.000000...	1	
3	Houston	Actual	2019M1	hostess	Jameson	James	7.00000000	0.00000000	1.000000...	2	
4	Houston	Actual	2019M1	sous chef	Thomas	Tom	5.00000000	0.00000000	1.000000...	3	
4500	0	Houston	Actual	2018M1	TBD	TBD	0.00000000	0.00000000	1.000000...	1	
4500	1	Houston	Actual	2018M1	TBD	TBD	0.00000000	0.00000000	1.000000...	1	
45000	0	Houston	Actual	2018M1	TBD	TBD	0.00000000	0.00000000	1.000000...	1	
78	0						0.00000000	0.00000000	0.000000...	0	
E000201	0	Houston.People.Plan...	BudgetV1	2011	Thermostat Specialist	Ibsen	Henrik	106431.0000...	0.02300000	1.000000...	3
E000201	0	Houston.People.Plan...	BudgetV1	2018	Thermostat Specialist	Ibsen	Henrik	106431.0000...	0.02500000	1.000000...	3
E000201	0	Houston.People.Plan...	BudgetV2	2011	Thermostat Specialist	Ibsen	Henrik	106431.0000...	0.02500000	1.000000...	3
E000201	0	Houston.People.Plan...	BudgetV2	2018	Thermostat Specialist	Ibsen	Henrik	106431.0000...	0.02500000	1.000000...	3
E000202	0	Houston.People.Plan...	BudgetV1	2011	Asst Facilities Mgr	Oates	Joyce	41679.000000...	0.04299999	1.000000...	1
E000202	0	Houston.People.Plan...	BudgetV1	2018	Asst Facilities Mgr	Oates	Joyce	41679.000000...	0.04299999	1.000000...	1
E000202	0	Houston.People.Plan...	BudgetV2	2011	Asst Facilities Mgr	Oates	Joyce	41679.000000...	0.04299999	1.000000...	1
E000202	0	Houston.People.Plan...	BudgetV2	2018	Asst Facilities Mgr	Oates	Joyce	41679.000000...	0.04299999	1.000000...	1
E000203	0	Houston.People.Plan...	BudgetV1	2011	Facilities Manager	Kane	Sarah	207150.0000...	0.01700000	1.000000...	5
E000203	0	Houston.People.Plan...	BudgetV1	2018	Facilities Manager	Kane	Sarah	207150.0000...	0.01700000	1.000000...	5



Test						
RegisterID	RegisterIDInstance	WFFProfileName	WFScearioName	WFTimeName	JobTitle	
		0	Houston	Actual	2018M1	Ana's test
		0	Houston.Forms	Actual	2019M1	Supplier
1		0	Houston	Actual	2019M1	chef master
12345		0	Profitability_Default.I...	Actual	2017M1	QA
2		0	Houston	Actual	2019M1	waiter

## Grid Keyboard Functionality

BrowserUX includes basic keyboard shortcuts including navigation with arrow keys and advancing through cells using either Enter or Tab.

## Large Data Pivot Grid & Pivot Grid

Pivot Grids in Browser UX come with a host of new features including Saved Reports, Charts, Calculated Fields, and Keyboard Navigation. Both Pivot Grid and Large Data Pivot Grid benefit from updated data processing that ensures all data is available for aggregation.

## Notable Differences in Pivot Grids

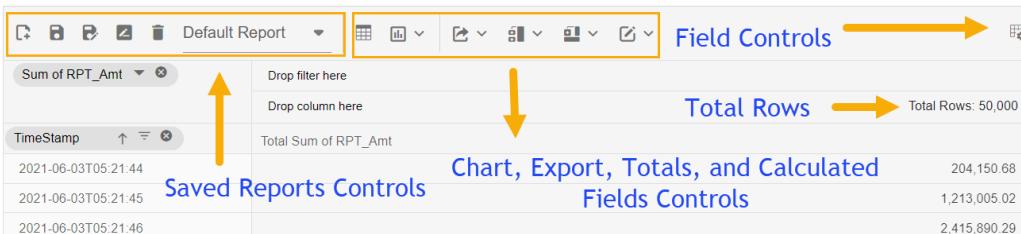
Field Controls are displayed in a floating dialog and launch using the *Show Fieldlist* button in the upper right corner of the pivot grid.

## Dashboards

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A count of total rows in the dataset is displayed on the top right of the pivot grid.

**NOTE:** This count will not change when filtering data, it will always display the total count of rows.

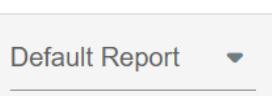


The screenshot shows the Power BI desktop ribbon with several controls highlighted by yellow arrows:

- Saved Reports Controls:** Located on the far left of the ribbon, with an arrow pointing to the 'New Report' icon.
- Field Controls:** Located on the far right of the ribbon, with an arrow pointing to the 'Total Rows' icon.
- Chart, Export, Totals, and Calculated Fields Controls:** Located in the center of the ribbon, with an arrow pointing to the 'Total Rows' icon.
- Total Rows:** A specific icon on the ribbon, with an arrow pointing to the text 'Total Rows: 50,000' in the pivot grid.

The pivot grid displays the following data:

	Sum of RPT_Amt	TimeStamp
Drop filter here	Sum of RPT_Amt	2021-06-03T05:21:44
Drop column here		2021-06-03T05:21:45
Total Sum of RPT_Amt	204,150.68	2021-06-03T05:21:46
	1,213,005.02	
	2,415,890.29	

Button	Action
	Create new report
	Save a report
	Save as current report
	Rename a current report
	Delete a current report
	Default Report dropdown

	Show table
	Chart types
	Export
	Subtotals
	Grand totals
	Formatting

## New Features in Pivot Grids

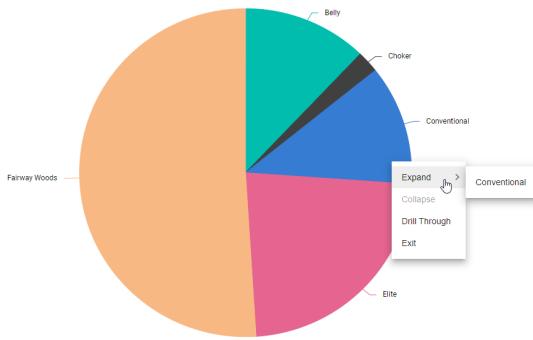
Saved Reports – Easily reference past grid configurations by saving reports. The default report will return the Pivot Grid to its initial configuration, while Create, Save, Save As, and Rename buttons manage custom reports. Find reporting functions in the Browser UX Pivot Grid Toolbar.

Charts – This new feature lets users easily visualize the data from a customized pivot grid into a chart. Simply select the Chart icon in the toolbar, then configure the available options. Charts can be saved as reports for future reference using the Saved Reports feature. See [Appendix B](#) for a full list of available chart types.

## Dashboards

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- Options: Show Legend, Multiple Axis
- Explore larger charts using the zoom feature. Available using scroll control on mouse, the zoom toolbar on the chart, or by using keyboard shortcuts.
- Visualize the expansion and collapse of the pivot grid data from the chart using right mouse click menu.

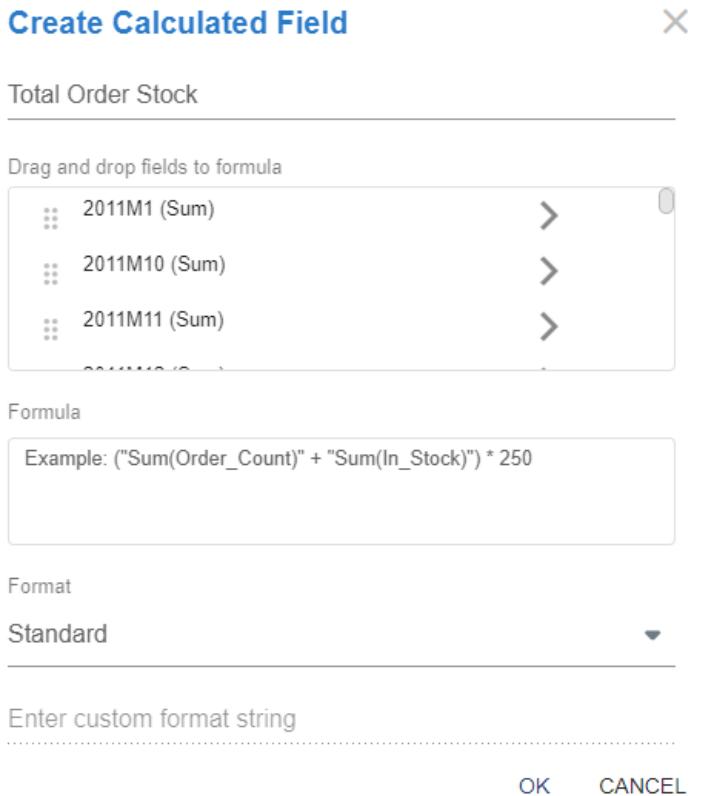


- Keyboard Functionality - A wide array of functions allow users to interact with Pivot Grids using keyboard shortcuts. See [Appendix B](#) for a full list of interactions.
- Calculated Fields - The calculated field feature allows users to create custom fields which are not present in the actual data. Users can create these fields using basic mathematical

## Dashboards

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expressions collaborating with existing fields. See [Appendix A](#) for syntax.



## Advanced Charts

There are some charts and configuration properties that are not currently supported. See [Appendix B](#) for a detailed breakdown.

## Notable Dashboard Functionality Gaps

### Dashboard Layouts

- Canvas
- Dock
- Wrap

## **Dashboard Components**

- Basic Charts
- Filter
- Map
- Password Box
- Sankey Diagram
- Spreadsheet
- State Indicator
- Text Editor
- Web Content
- Member Tree

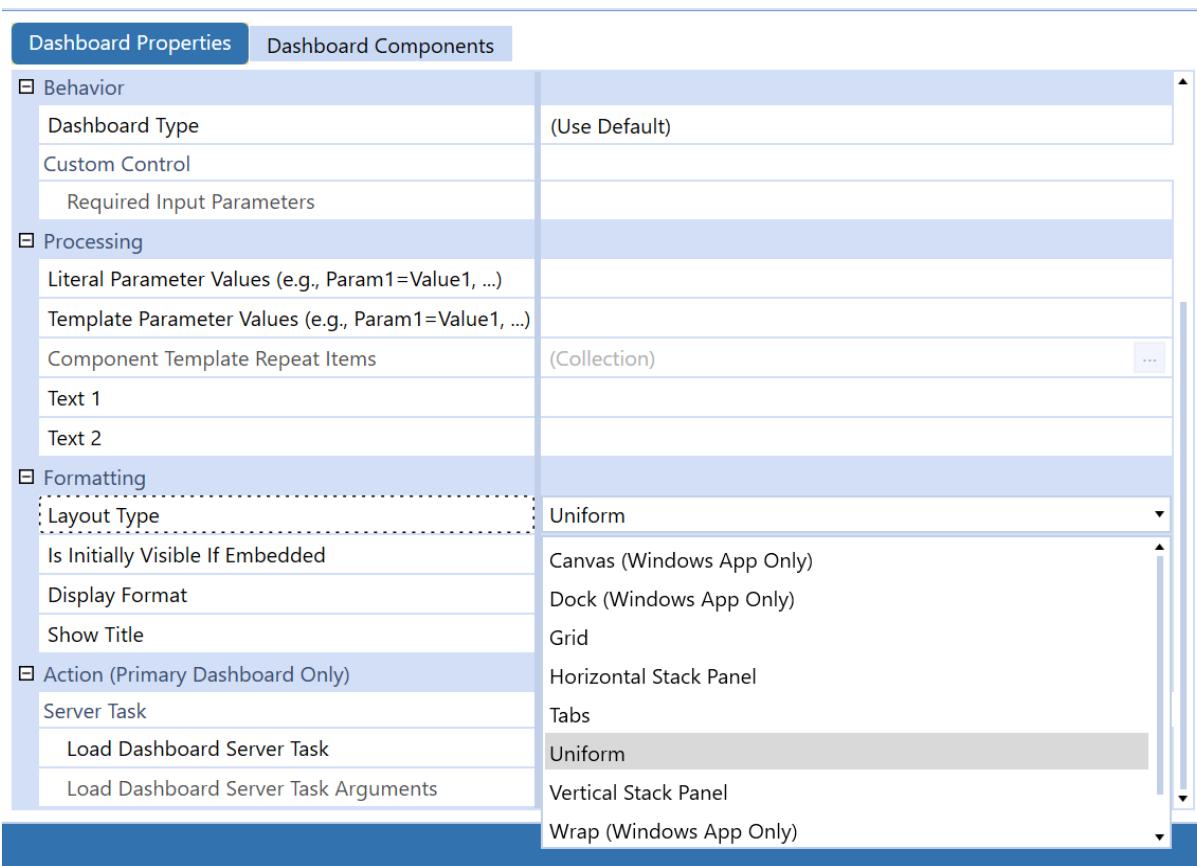
## **Navigating Dashboard Gaps**

Helpful tips have been added to both the Windows Client and BrowserUX to assist dashboard designers and end users in identifying dashboard layouts and components that are not yet supported in BrowserUX.

In the Windows Client, labels for Windows App Only have been added to both the Dashboard Properties Layout Type and Dashboard Component selection lists.

## Dashboards

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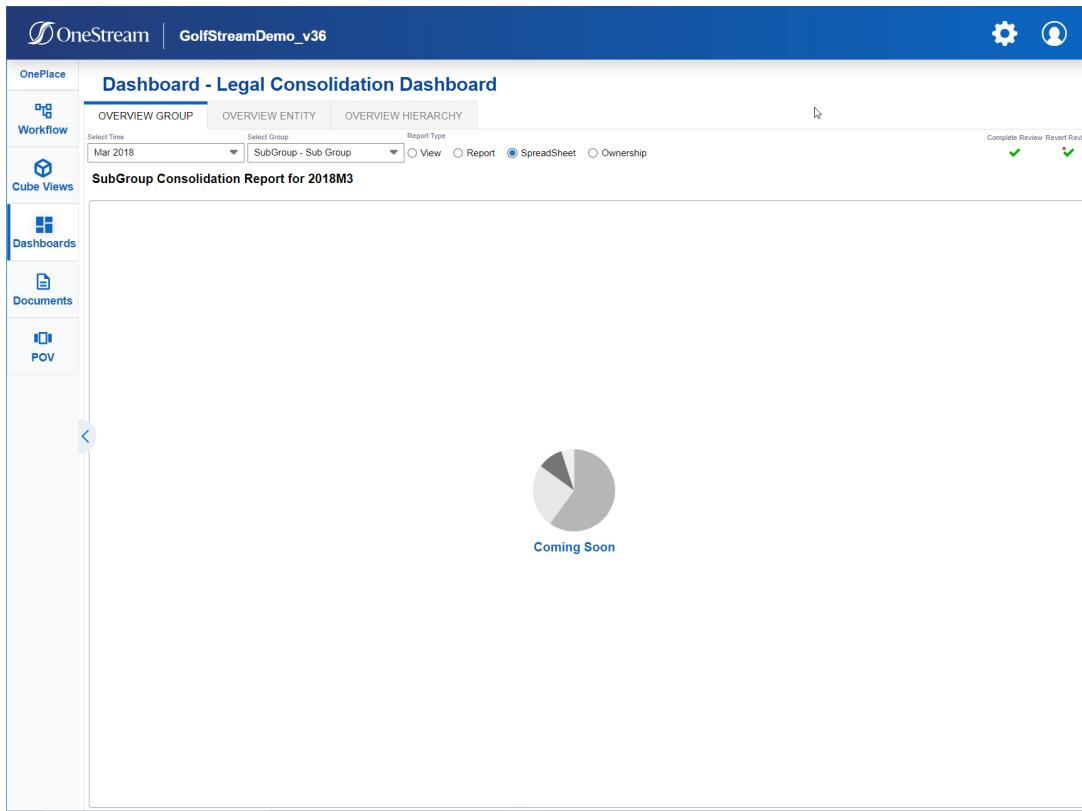


The screenshot shows the 'Dashboard Properties' tab selected in the top navigation bar. The main area is divided into sections: 'Behavior', 'Processing', 'Formatting', and 'Action (Primary Dashboard Only)'. The 'Formatting' section is expanded, showing a dropdown menu for 'Layout Type' with the following options: Uniform, Canvas (Windows App Only), Dock (Windows App Only), Grid, Horizontal Stack Panel, Tabs, Uniform (selected), Vertical Stack Panel, and Wrap (Windows App Only). A tooltip for 'Uniform' indicates it is 'Windows App Only'.

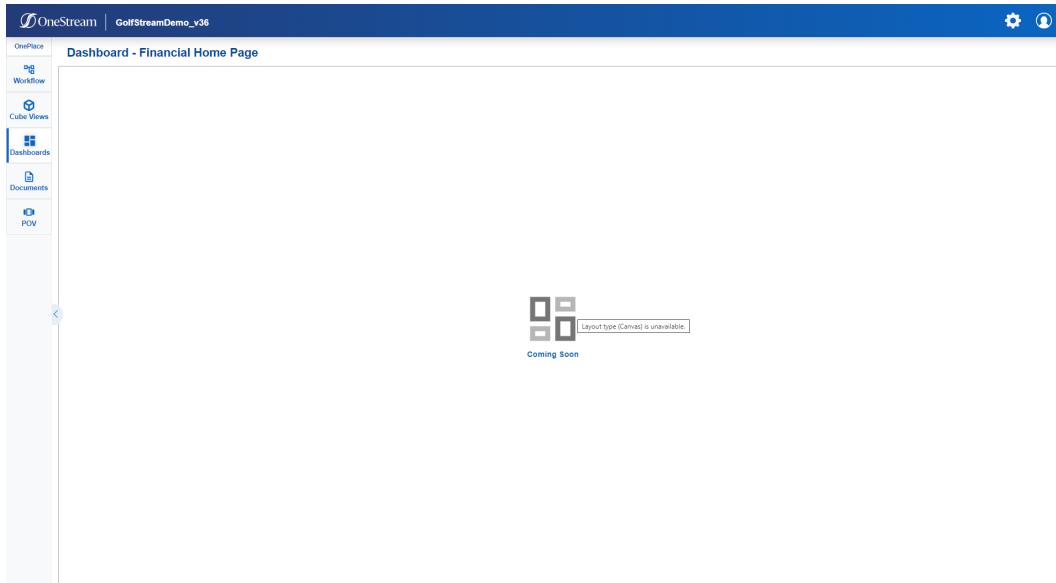
In BrowserUX, a placeholder image indicates if the dashboard layout or component is not currently supported. A hover tooltip specifies the layout or component that is not rendering.

## Dashboards

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The screenshot shows the OneStream interface for the 'GolfStreamDemo\_v36' environment. The left sidebar includes links for OnePlace, Workflow, Cube Views, Dashboards (which is selected and highlighted in blue), Documents, and POV. The main content area is titled 'Dashboard - Legal Consolidation Dashboard' and displays a message 'SubGroup Consolidation Report for 2018M3'. At the top of this area are tabs for 'OVERVIEW GROUP', 'OVERVIEW ENTITY', and 'OVERVIEW HIERARCHY', with 'OVERVIEW GROUP' being the active tab. Below these are dropdowns for 'Selected Time' (set to 'Mar 2018') and 'Select Group' (set to 'SubGroup - Sub Group'), and radio buttons for 'Report Type' ('View' and 'Report' are options, 'SpreadSheet' is selected). To the right of these controls are buttons for 'Complete Review' (with a green checkmark) and 'Revert Review' (with a green checkmark). The main content area contains a pie chart placeholder with the text 'Coming Soon' below it.



The screenshot shows the OneStream interface for the 'GolfStreamDemo\_v36' environment. The left sidebar includes links for OnePlace, Workflow, Cube Views, Dashboards (selected and highlighted in blue), Documents, and POV. The main content area is titled 'Dashboard - Financial Home Page'. It features a placeholder with a grid icon and the text 'Layout type (Carded) is unavailable' and 'Coming Soon' below it.

Even if all dashboard layouts and components are supported, we still recommend conducting a full regression test of any dashboard that is being transferred from the Windows Client to BrowserUX to ensure functional parity before production use.

# BrowserUX Dashboard Design Process

When building a dashboard for BrowserUX use, designers should open both their Windows and BrowserUX clients simultaneously. Using the Windows Client, designers can update and save dashboard configurations. To view changes reflected in BrowserUX, simply refresh the browser.

When building a dashboard for use on a tablet or phone, designers can follow the same process, using either a physical device or mobile device emulator in a browser. Designers should make sure they log into their BrowserUX environment with the emulator properly sized to ensure BrowserUX reacts to the device it is emulating.

As with the Windows Client, using dashboard design best practices can significantly improve the performance of a dashboard. BrowserUX may have performance sensitivities that differ from the Windows Client.

## Multi-client/Device Dashboard Design Approaches

When designing a dashboard that will be used across multiple clients or devices, dashboard designers can use three different approaches to find the right balance of upfront effort, end-user optimization, and maintenance effort that best suits their needs.

### Approach 1: Unified Multi-client/Device Dashboards

This approach uses a single non-adaptive dashboard. The designer will most likely have to make compromises to make it usable for each client/device type. These compromises typically result in a simplified dashboard with efficient maintenance. This type of dashboard needs to have the proper combination Client/Device Visibility configurations to be accessible from the OnePlace Dashboard across clients and devices. It can be more difficult for multi-device use due to varying space for dashboard components, but it is an effective way to access dashboards in BrowserUX initially. Designers can rely on this approach to update existing Windows Client dashboards for use in BrowserUX. For more complex scenarios, designers should consider building client/device specific dashboards or adaptive dashboards.

## **Approach 2: Client/Device Specific Dashboards**

This approach uses multiple non-adaptive dashboards. Designers create separate dashboards that render equivalent information and functionalities but have different designs that are optimized for specific client and device types. These dashboards need to be added to separate dashboard profiles. Each of the dashboard profiles have different Client/Device Visibility configurations, which limits their visibility in the OnePlace Dashboard list to only the appropriate client or device they were designed for. This approach offers an optimized user experience and low design complexity, but it has a high maintenance effort.

## **Approach 3: Client/Device Adaptive Dashboards**

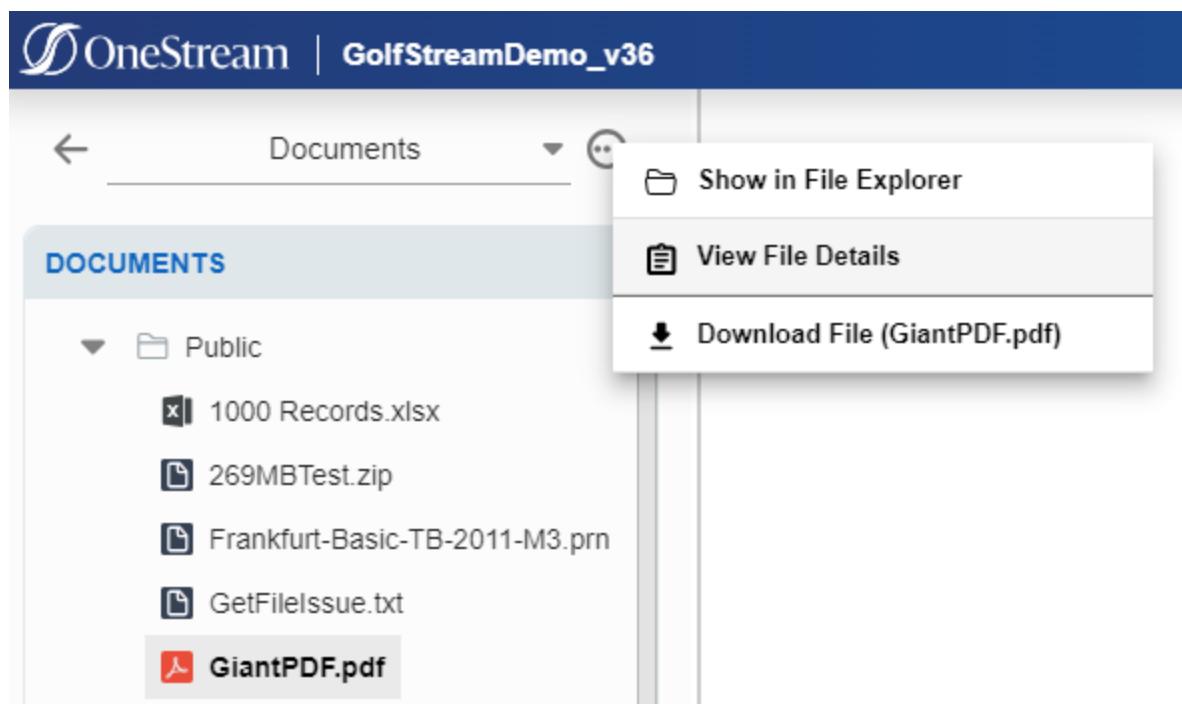
This approach uses a single adaptive dashboard. Designers need an initial understanding of how their dashboard should adapt to each client or device type intended for use. The designer creates Embedded Dashboards with configurations that link to client/device specific dashboards. The Embedded Dashboards can be placed at any level within nested dashboards. Allowing designers to easily customize components shared across multiple devices or create unique experiences per device type. This approach offers a highly optimized user experience and lower maintenance effort, but it has high design complexity.

Current dashboards that have been designed previously for the OneStream Windows Client may need to be redesigned for an optimized user experience in BrowserUX or alternative device types.

# Documents

The Documents area in BrowserUX has a similar navigation pattern with the Windows Client. However, the Browser Client downloads files instead of opening them in their native application. A context menu has been added to the top of the Documents area, which contains a download button for selected documents. This Context Menu also contains an Open File Explorer button and View File Details button. The File Details can also be viewed by double clicking onto the file itself. When a folder is selected the Context Menu only has the Open File Explorer button and the View Folder Details button.

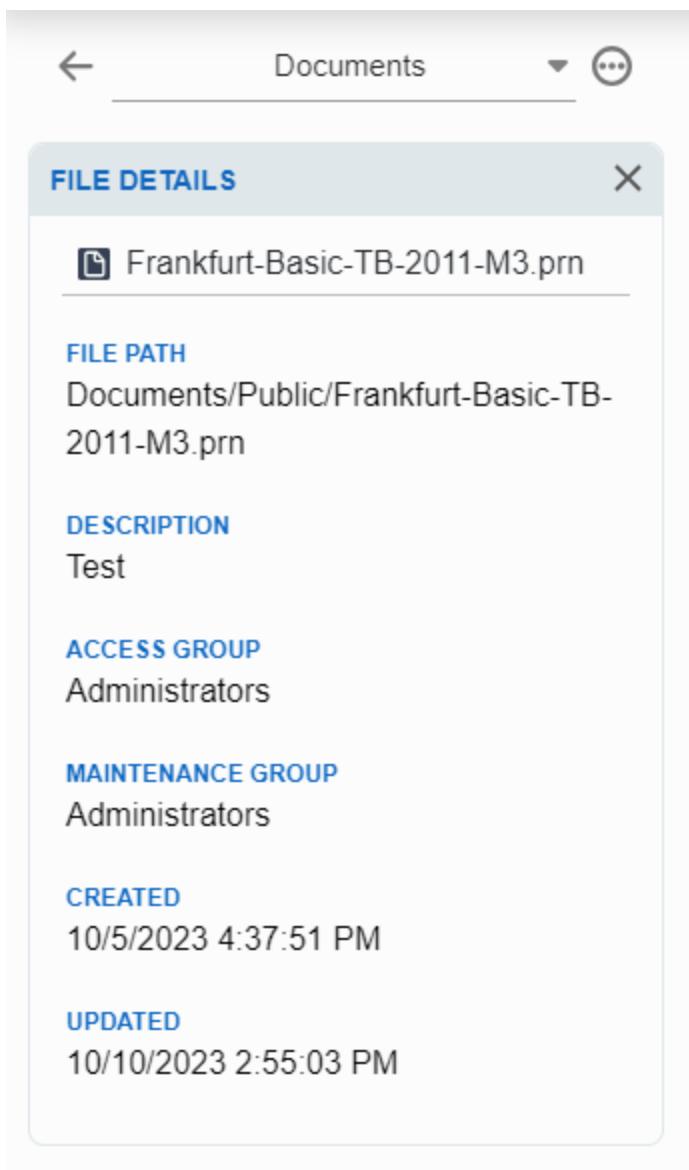
POV can be applied through the File Explorer only.



Additionally, by double-clicking the file, folder or selecting View File Details from the context menu, you can see the File Details or Folder Details.

## Documents

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The screenshot shows a 'FILE DETAILS' dialog box overlaid on a 'Documents' interface. The dialog box contains the following information:

- FILE DETAILS**: The title of the dialog box.
- FILE**: Frankfurt-Basic-TB-2011-M3.prn
- FILE PATH**: Documents/Public/Frankfurt-Basic-TB-2011-M3.prn
- DESCRIPTION**: Test
- ACCESS GROUP**: Administrators
- MAINTENANCE GROUP**: Administrators
- CREATED**: 10/5/2023 4:37:51 PM
- UPDATED**: 10/10/2023 2:55:03 PM

# POV

In BrowserUX, POV is in the OnePlace panel. To view and modify the current Cube POV, select the POV menu from the OnePlace panel. Similar to Workflow POV, the Cube POV Edit menu is displayed as an overlay menu, instead of a pop-up dialog. It's also important to note that information from the Windows Application POV menu is displayed in a few different areas in BrowserUX:

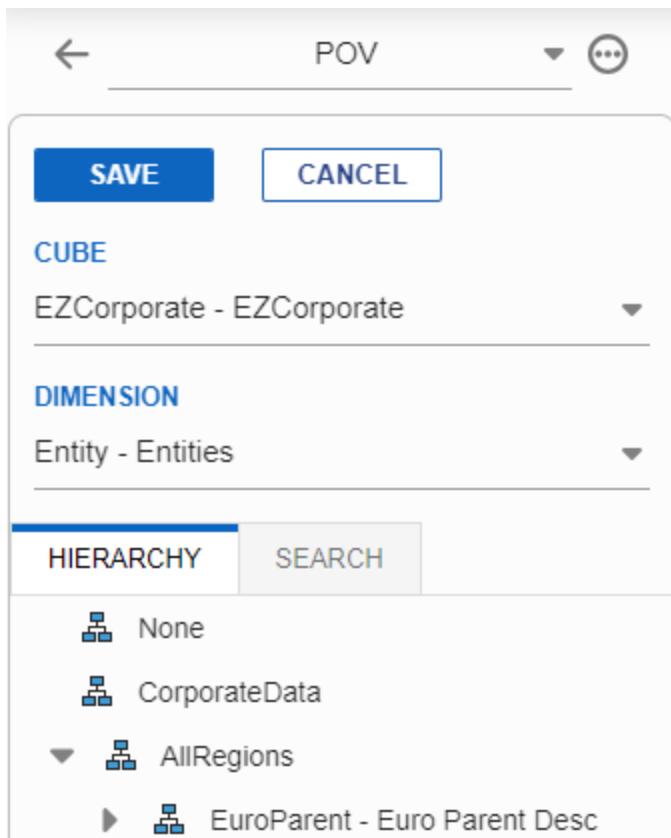
- **Global POV:** Select the gear icon in the header to view current Global POV settings.
- **Workflow POV:** Select Workflow in the OnePlace panel to view and modify the current Workflow POV.

## Additional Features

### Modify a POV

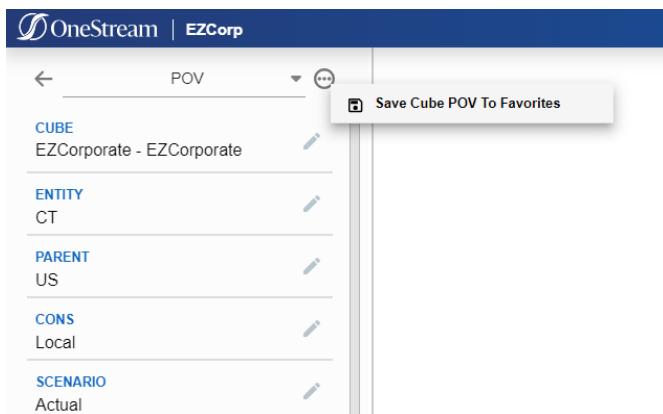
To modify a POV, click the pencil icon next to each field, make your modification, and click Save.





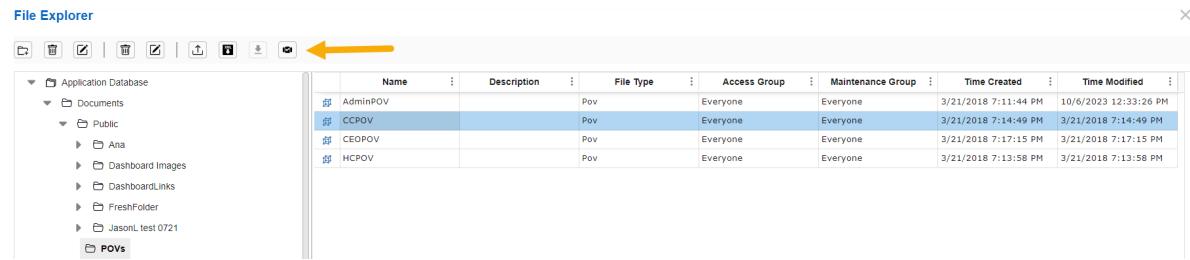
## Save a POV

To save a POV, select Save POV from the POV context menu. File Explorer will open with an option to name and save the current POV settings.



## Set a Saved POV

Saved POVs are stored in File Explorer. To set a saved POV, use the **Apply POV** button in the File Explorer toolbar. POV can be applied through the File Explorer only.



# Third-Party Component Technology

OneStream is created using both OneStream's own tools and third-party tools in the authoring, installation, and running of OneStream's supported products. OneStream BrowserUX third-party developer components include Syncfusion. OneStream customers are not required to purchase these developer tools.

The copyright notice with respect to these third parties is as follows:

- Syncfusion. (c) 2001-2023 Copyright Syncfusion Inc. All rights reserved.

For a comprehensive list of all third-party component tools throughout the OneStream Windows Client application, see [Third-Party Component Technology](#).

# Appendix A: Pivot Grids

## Calculated Fields Syntax

Add a Calculated Field to Pivot Grids in BrowserUX by selecting Show Field List from the toolbar, then Calculated Field. The following syntax gives users several options for customizing fields.

Operator	Name	Syntax
+	addition	$X + Y$
-	subtraction	$X - Y$
*	multiplication	$X * Y$
/	division	$X / Y$
<sup>^</sup>	power	$X^2$
<	Less than	$X < Y$
<=	less than or equal	$X <= Y$
>	greater than	$X > Y$
>=	greater than or equal	$X >= Y$
==	equal	$X == Y$
!=	not equal	$X != Y$
	OR	$X   Y$
&	AND	$X & Y$

## Appendix A: Pivot Grids

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?	conditional	condition ? then : else
isNaN	function that checks if the value is not a number	isNaN(value)
!isNaN	function that checks if the value is a number	isNaN(value)
abs	function that returns the absolute value of a number	abs(number)
min	function that returns the minimum value	min (number1, number2)
max	function that returns the maximum value	max (number1, number2)

## Keyboard Navigation in Pivot Grids

Focus	
Alt + J	Focuses the Pivot Table component.
PivotTable	
Tab	Moves the cell focus right side. If no cells are focused, it moves to the next active element in the browser page.
Shift + Tab	Moves the cell focus left side. If no cells are focused, it moves to the previous active element in the browser page.
Down arrow	Moves the cell focus downwards.
Up arrow	Moves the cell focus upwards.

## Appendix A: Pivot Grids

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Left arrow	Moves the cell focus left side.
Right arrow	Moves the cell focus right side.
Home	Goes to the first cell in the current row.
End	Goes to the last cell in the current row.
Ctrl + Home	Goes to the first cell in the table.
Ctrl + End	Goes to the last cell in the table.
Enter	If the current cell is an expand/collapse cell, it performs expand/collapse operation (drill operation). If the current row/column header is in value sort state, it performs value sorting.
Shift + Enter	If value sorting is enabled in the pivot table and the current cell is a header with respect to its value axis, it performs value sorting to either ascending or descending order.
<b>Grouping Bar</b>	
Tab	Moves to the next active element (field's button) in the grouping bar. If no active elements present, it moves to the next active element in the browser page.
Shift + Tab	Moves to the previous active element (field's button) in the grouping bar. If no active elements present, it moves to the previous active element in the browser page.
Shift + F	If the current active element is a field's button and if it has a filter icon, the filter dialog will be opened to perform filtering.
Shift + S	If the current active element is a field's button and if it has a sort icon, the sorting will be performed to the selected field.

## Appendix A: Pivot Grids

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Shift + E	If the current active element is a calculated field's button and if it has an edit icon, the calculated field dialog will be opened to perform editing the selected calculated field.
Enter	Performs the selection operation of the current active element. If the current active element is a field's button and it has a dropdown icon, the aggregation menu will open to perform calculations using aggregation options to the selected value field.
Delete	If the current active element is a field's button, the selected field will be removed from the current report.
Down arrow	If the current active element is a dropdown list, the next item will be selected.
Up arrow	If the current active element is a dropdown list, the previous item will be selected.
Home	If the current active element is a dropdown list, the first item will be selected.
End	If the current active element is a dropdown list, the last item will be selected.
Alt + Down	If the current active element is a dropdown list, the popup will be opened.
Alt + Down	If the current active element is a dropdown list, the popup will be closed.
Esc or Escape	Closes the dropdown list.
<b>Field List</b>	
Ctrl + Shift + F	If the popup field list is enabled in either the pivot table or the pivot chart, the field list dialog will be opened.
Tab	Moves to the next active element in the field list. If no active elements present, it moves to the next active element in the browser page.

## Appendix A: Pivot Grids

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Shift + Tab	Moves to the previous active element in the field list. If no active elements present, it moves to the previous active element in the browser page.
Shift + F	If the current active element is a field's button and if it has a filter icon, the filter dialog will be opened to perform filtering.
Shift + S	If the current active element is a field's button and if it has a sort icon, the sorting will be performed to the selected field.
Shift + E	If the current active element is a calculated field's button and if it has an edit icon, the calculated field dialog will be opened to perform editing the selected calculated field.
Enter	Performs the selection operation of the current active element. If the current active element is a field's button and if it has a dropdown icon, the aggregation menu will be opened to perform calculations using aggregation options to the selected value field.
Delete	If the current active element is a field's button, the selected field will be removed from the current report.
Down arrow	If the current active element is a tree node, it moves to the next node.
Up arrow	If the current active element is a tree node, it moves to the previous node.
Left arrow	If the current active element is a tree node, it collapses the current node.
Right arrow	If the current active element is a tree node, it expands the current node.
Home	If the current active element is a tree node, it goes to the first node.
End	If the current active element is a tree node, it goes to the last node.
Space	If the current active element is a tree node or a checkbox element, it will be either checked or unchecked.

## Appendix A: Pivot Grids

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Esc or Escape	Closes the popup field list dialog.
<b>Toolbar</b>	
Tab	Moves to the next active option in the toolbar. If no active elements present, it moves to the next active element in the browser page.
Shift + Tab	Moves to the previous active option in the toolbar. If no active elements present, it moves to the previous active element in the browser page.
Enter	Performs the selection operation of the current active element.
<b>Calculated Field</b>	
Shift + E	If the current active element is a field's button and if it has an edit icon in either the field list or grouping bar UI, the calculated field dialog will be opened to perform editing the selected calculated field.
Tab	Moves to the next active element in the calculated field dialog. If no active elements present, it moves to the next active element in the browser page.
Shift + Tab	Moves to the previous active element in the calculated field dialog. If no active elements present, it moves to the previous active element in the browser page.
Enter	Performs the selection operation of the current active element. If the current active element is a tree node, it copies the selected field name/formula to the formula text area to perform calculations.
Down arrow	If the current active element is a tree node, it moves to the next node.
Up arrow	If the current active element is a tree node, it moves to the previous node.
Left arrow	If the current active element is a tree node, it collapses the current node.

## Appendix A: Pivot Grids

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Right arrow	If the current active element is a tree node, it expands the current node. If the current active element is a tree node and has a menu icon, the aggregation menu will be opened to select appropriate aggregation type to the selected field.
Home	If the current active element is a tree node, it goes to the first node.
End	If the current active element is a tree node, it goes to the last node.
Esc or Escape	Closes the filter dialog.
<b>Drill Through</b>	
Tab	Moves to the next active element in the drill-through dialog. If the current active element is a Grid cell, it moves the cell focus to right side. If no active elements present, then it moves to the next active element in the browser page.
Shift + Tab	Moves to the previous active element in the drill-through dialog. If the current active element is a Grid cell, it moves the cell focus to left side. If no active elements present, then it moves to the previous active element in the browser page.
Down arrow	Moves the row/cell focus downwards.
Up arrow	Moves the row/cell focus upwards.
Left arrow	Moves the cell focus left side.
Right arrow	Moves the cell focus right side.
Home	Goes to the first cell in the current row.
End	Goes to the last cell in the current row.

## Appendix A: Pivot Grids

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Ctrl + Home	Goes to the first cell in the table.
Ctrl + End	Goes to the first cell in the table.
Enter	Performs the selection operation of the current active element.
Esc or Escape	If the cell is in selected state, it deselects all rows/cells. If the row/cell is in edit state, it cancels the current entries in the row/cell. If the current active element is not a row/cell, it closes the drill-through dialog.
F2	If the cell is in selected state, it deselects all rows/cells. If the row/cell is in edit state, it cancels the current entries in the row/cell. If the current active element is not a row/cell, it closes the drill-through dialog.
Insert	Adds a new row/cell in the data grid.
Delete	Removes the selected row in the data grid.
<b>Filter Dialog</b>	
Shift + F	If the current active element is a field's button and if it has a filter icon in either the field list or grouping bar UI, the filter dialog will be opened to perform filtering.
Tab	If the current active element is a field's button and if it has a filter icon in either the field list or grouping bar UI, the filter dialog will be opened to perform filtering.
Shift + Tab	Moves to the next active element in the filter dialog. If no active elements present, it moves to the next active element in the browser page.
Enter	Moves to the previous active element in the filter dialog. If no active elements present, it moves to the previous active element in the browser page.
Down arrow	If the current active element is a tree node, it moves to the next node.

## Appendix A: Pivot Grids

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Up arrow	If the current active element is a tree node, it moves to the previous node.
Left arrow	If the current active element is a tree node, it collapses the current node. If the current active element is a tab, it moves focus to the previous tab element.
Right arrow	If the current active element is a tree node, it expands the current node. If the current active element is a tab, it moves focus to the next tab element.
Home	If the current active element is a tree node, it goes to the first node.
End	If the current active element is a tree node, it goes to the last node.
Space	If the current active element is a tree node or a checkbox element, it will be either checked or unchecked.
Esc or Escape	Closes the filter dialog.
Alt + Down	If the current active element is a DropDownList or DatePicker or DateTimePicker, the popup will be opened.
Alt + Up	If the current active element is a DropDownList or DatePicker or DateTimePicker, the popup will be closed.

## Chart Types in Pivot Grids

These are the available chart types within Pivot Grids.

Column, Stacked Column, 100% Stacked Column	Bubble
Bar, Stacked Bar, 100% Stacked Bar	Pareto
Line, Stacked Line, Step Line, 100% Stacked Line	Radar
Area, Stacked Area, Step Area, 100% Stacked Area	Pie

## Appendix A: Pivot Grids

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Scatter	Doughnut
Polar	Funnel
Spline	Pyramid

# Appendix B: Advanced Charts

The following chart types are currently supported by the BrowserUX Advanced Charts dashboard component.

XY2D	Area, Area Stacked, Area Full Stacked, Area Spline, Area Step, Bar, Bar Stacked, Bar Full Stacked, Bar Side By Side Stacked, Bar Side By Side Full Stacked, Line, Line Stacked, Line Full Stacked, Line Step
Simple2D	Nested Donut, Pie And Donut

The following chart types are not currently supported by the BrowserUX Advanced Charts dashboard component.

XY2D	Area Range, Bar Side By Side, Bar Range Overlapped, Bar Range Overlapped Waterfall, Bar Range Side By Side, Bar Range Side By Side Waterfall, Bubble, Candlestick, Line Scatter, Point, Spline, Stock, Waterfall
Simple2D	Funnel
Polar2D	Polar Area, Polar Line, Polar Point
Radar2D	Radar Area, Radar Line, Radar Point

# Configuration Properties

The following chart configuration properties are not currently supported.

Chart	Show Toggle Size Button, Point Label Text Format, Enable Animations
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## Appendix B: Advanced Charts

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Crosshair	Crosshair Enabled, Show Crosshair Lines, Show Crosshair Labels, Crosshair Label Mode, Crosshair Label Text Format
Legend	Show Check Boxes, Show Border
X-Axis, Y-Axis, Secondary Y-Axis	Text Format, Use Automatic Step, Step, Interlaced, Interlaced Color, Show Minor Grid Lines
Y-Axis, Secondary Y-Axis	Scale Break Style Type, Maximum Number of Scale Breaks
Series Properties	Model Display Type, Marker Size, Bar Width, Pie Hole Radius Percent
Waterfall Series Properties	Start Bar Color, Total Bar Color, Rising Bar Color, Falling Bar Color, Total Included In Series, Total Value Label, Include Subtotals, Subtotal Indexes, Subtotal Labels, Subtotal Bar Color, Label Position