



Modern Browser Experience Guide

8.4.1 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 modern browser experience 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 browser navigational features and UI (user interface) elements.
- Provide prerequisites and directions for implementation of a browser experience 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 browser and Windows Application.

Modern Browser Experience Overview

Welcome to the modern browser experience, OneStream's latest, web-based offering. The modern browser experience works alongside the existing OneStream Windows Application, giving users more flexibility by providing them with a way to access their data from anywhere using a wide range of devices. OneStream on the browser delivers a streamlined, modernized experience that strives to provide comprehensive coverage of end user features. With a strong foundation developed utilizing contemporary concepts and technologies, the modern browser experience introduces a suite of innovative designs and improved solutions.

All MarketPlace Solutions should render in the Modern Browser Experience. To find out which solutions are officially supported in the Modern Browser Experience, refer to solution documentation. Additionally, functionality provided through the System and Application Tabs is not yet available through the browser.

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

For requirements, see [Hardware and Software requirements](#).

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](#).

Modern Browser Experience Updates 8.4

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

The modern browser experience releases features significant enhancements to the User Experience. Release 8.4 continues to build in the Workflow and Dashboard areas to ensure a cohesive experience for existing Windows Application users.

We have rebranded our Platform. Our new look provides a modern experience, thoughtfully crafted to improve your experience.

Workflow

Feature	Description
Workflow Navigation	You can now quickly change your Workflow POV using the links at the top of your Workflow page.
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 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 Windows Application, renaming a journal requires you to launch a Rename Journal dialog. In the browser, 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 Filter button in the Journals 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.
Journal Line Item Text Input	You can type member names in fields with dimension member selection.
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.

Dashboard

Feature	Description
Spreadsheet	Spreadsheet can now be used as a Dashboard component and in Form Templates. Data can be pulled into Spreadsheet from files, Cube View Connections, Table View Definitions, and nine currently supported Retrieve Functions. Files can also be created and saved to various locations, and Spreadsheet data can be refreshed or submitted as needed.
Text Editor	The Text Editor component for dashboards provides designers and users with the ability to create, open, and save documents and/or Extensible Documents through a familiar word processing interface. It supports features like Spell Check, as well as custom OneStream functions.

Web Content	The Web Content component for dashboards has been implemented and gives designers the ability to refer users to a specified web URL.
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.

Functional Capabilities

Feature	Description
Logon Agreement	A custom Logon Agreement can be configured for the Platform that requires users to acknowledge a specified message prior to completing the log in process.
Header Banner	The header banner functionality matching the Windows Application functionality is available in the browser.
Environment Name	The environment name now appears at the top of the page.
Export Dashboard Reports	You can now export dashboard reports.

Access the Browser Experience

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

Authentication

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

The setup and configuration of the browser experience may vary based on how your environments are hosted. For self-hosted environments, users can authenticate into the browser using their existing authentication method. Additional instructions for self-hosted authentication can be found in the [Installation Guide](#).

General Navigation

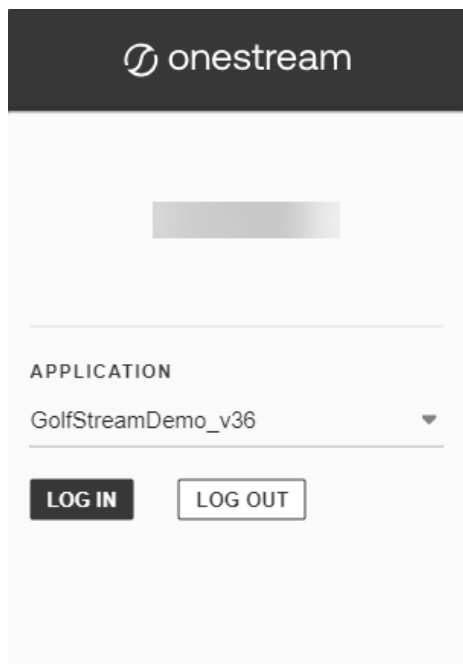
Learn how to navigate browser experience. This section explores foundational capabilities of the browser experience, general features and highlights notable differences between the browser and Windows Application.

Intuitive User Experience

Log in

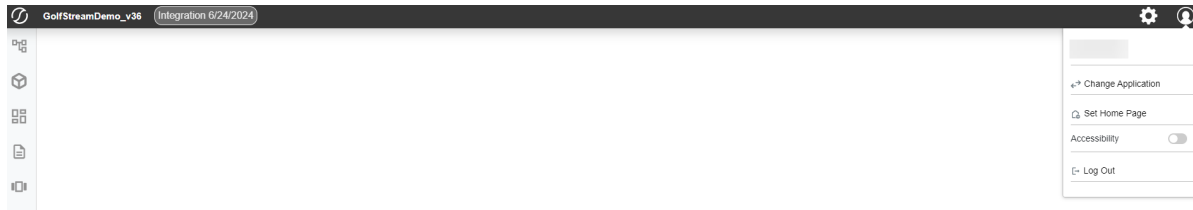
The modern browser experience is accessed through a web browser instead of using a Windows shortcut or ClickOnce to open a local instance of OneStream. You can use bookmarked URLs to navigate to the browser. Once successfully authenticated, you can select an application from the drop-down menu and click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

The browser environment 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, the browser will display a OneStream Home Page or, if multiple Applications are available, an Application Selector.

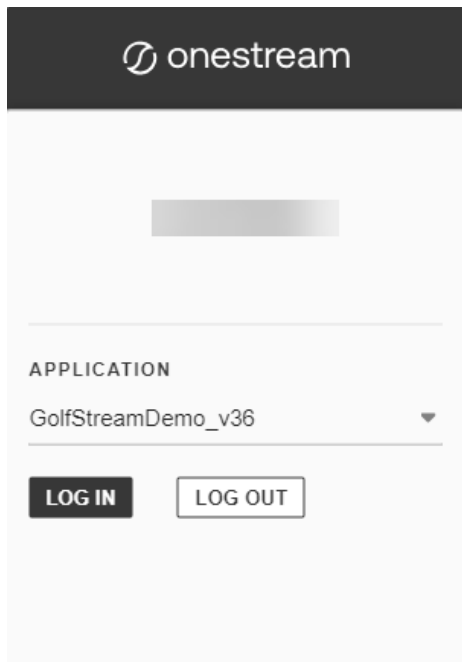


Log out

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



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





Logging off 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.

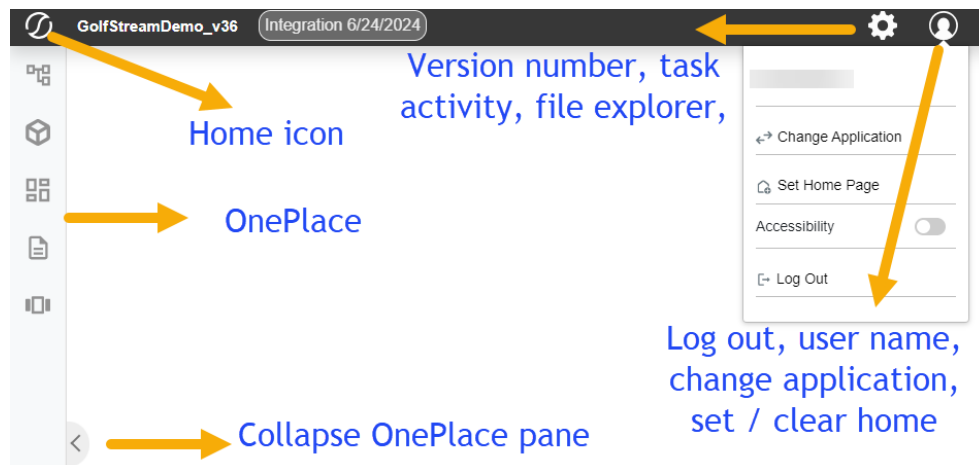
Header

The browser experience 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.

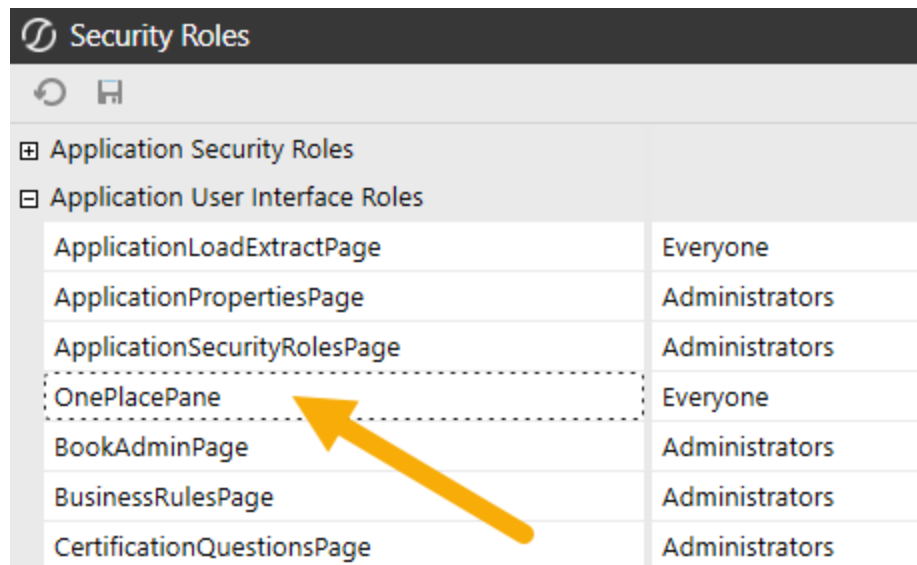
NOTE: The OnePlace panel may be fully hidden for certain users using security settings.



OnePlace Panel

Hide OnePlace Panel

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

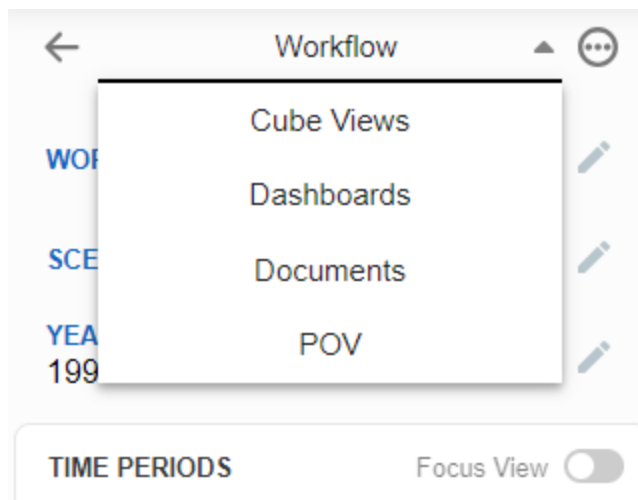


Security Roles	
Application Security Roles	
Application User Interface Roles	
ApplicationLoadExtractPage	Everyone
ApplicationPropertiesPage	Administrators
ApplicationSecurityRolesPage	Administrators
OnePlacePane	Everyone
BookAdminPage	Administrators
BusinessRulesPage	Administrators
CertificationQuestionsPage	Administrators

Navigate OnePlace Panel Sections

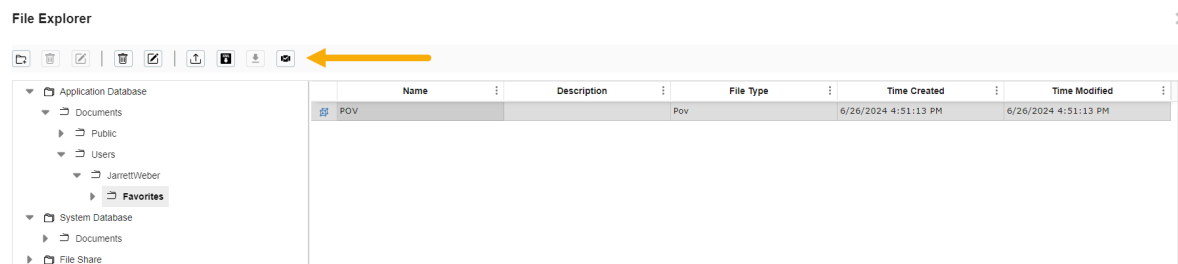
In the expanded OnePlace panel, there is a drop-down menu at the top of each area to navigate between them.

General Navigation




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 browser 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, the browser experience 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, the browser 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. See [Appendix D](#) for a list of supported Number Formats.

General Navigation

NOTE: There is currently a known issue where high resolution screens can render the scroll bar unable to reach the last row in a grid.

Amount	HoustonEntities
86,400,000.0	↑ Sort Ascending
28,704,154.5	↓ Sort Descending
3,879,484.1	☰ Columns
3,561,084.4	⌵ Filter
11,839,604.0	📄 Set column position
1,600.0	🔒 Lock
3,200.0	🔓 Unlock
1,050,481.8	◀ Move Previous
3,740,384.4	▶ Move Next
2,121,928.9	
-221,962.4	
2,546,879.1	
495.6	

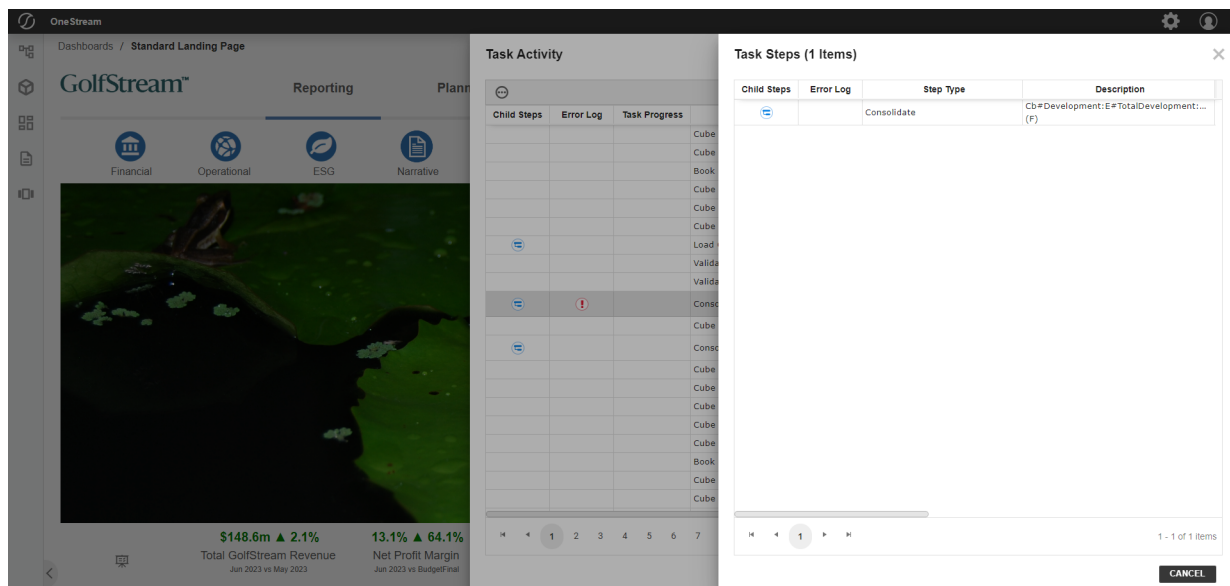
Dashboards / GridViews_Dashboard

⋮

- ↔ AutoFit
- ↻ Reset State
- 🔄 Reset All States
- 📄 Export
 - Excel
 - CSV

Anchored Dialogs

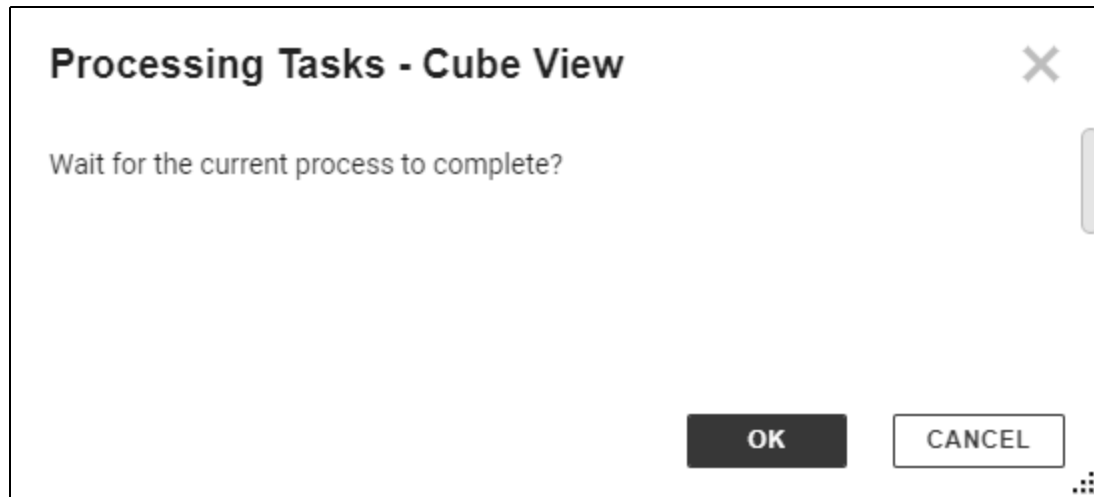
Many of the dialog boxes display in a slide-out panel anchored to the right side of the page instead of the floating dialogs used in the Windows Client. This paradigm offers improved visibility and provides consistency for users accessing the browser from various devices. Slide-out panels can be expanded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



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 are ignored.

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.



Workflow

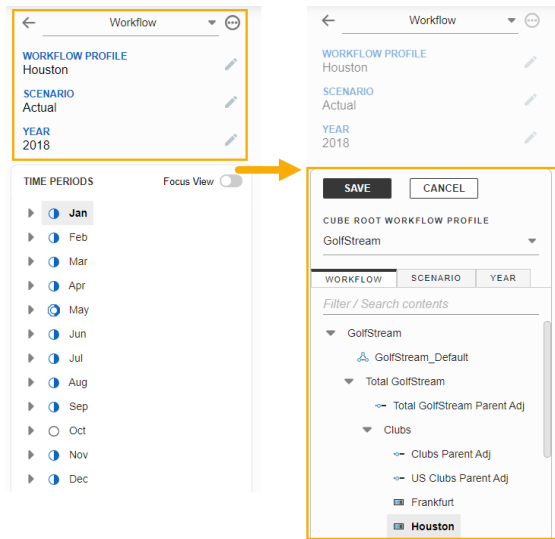
Workflow on the browser delivers the same functionality offered in the Windows Application with a few notable exceptions mentioned below. Some tactical user experience improvements have been made, while primarily focusing on delivering the functionality of the workflow steps.

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 browser 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.

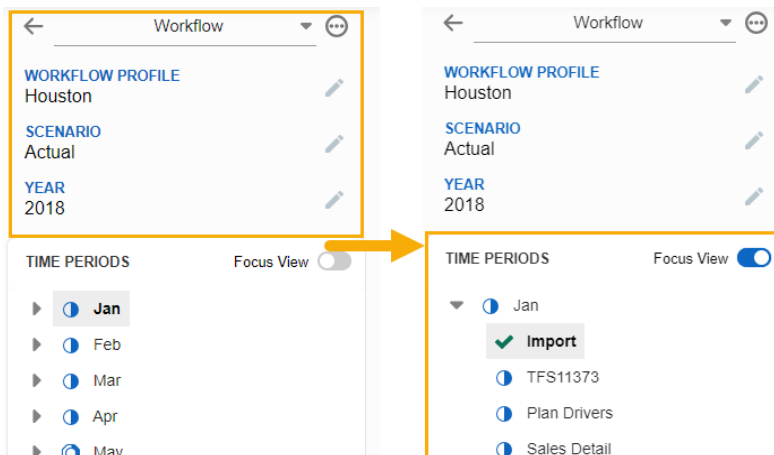
Workflow



Houston / Actual / 2018 / Jan / Import





























Target Intersections (Loaded)									
	HoustonEntities	Time	View	HoustonAccounts	Flows	IC	CostCenters		
Import	ouston Heights	2018M1	YTD	(Bypass)	None	None	None	None	Nr
Forms	ouston Heights	2018M1	YTD	10300	None	None	None	None	Nr
Journals	ouston Heights	2018M1	YTD	10400	None	None	None	None	Nr
BI Bleed Test	ouston Heights	2018M1	YTD	11000	None	None	None	None	Nr
HercTest	ouston Heights	2018M1	YTD	11200	None	Carlsbad	None	None	Nr
HercTest2	ouston Heights	2018M1	YTD	11200	None	Montreal	None	None	Nr
DirectLoad	ouston Heights	2018M1	YTD	11300	None	None	None	None	Nr
Central Import Test	ouston Heights	2018M1	YTD	12000	None	None	None	None	Nr
Central_Journal_Test	ouston Heights	2018M1	YTD	12200	None	None	MatMgt	None	Nr
ImportSmoke	ouston Heights	2018M1	YTD	12200	None	None	None	None	Nr
GlobalPOV	ouston Heights	2018M1	YTD	12300	None	None	Admin	None	Nr
	ouston Heights	2018M1	YTD	12300	None	None	Dist	None	Nr

- 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.



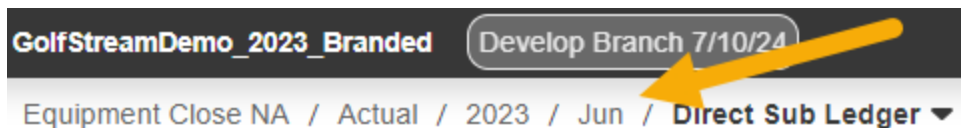
Workflow

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

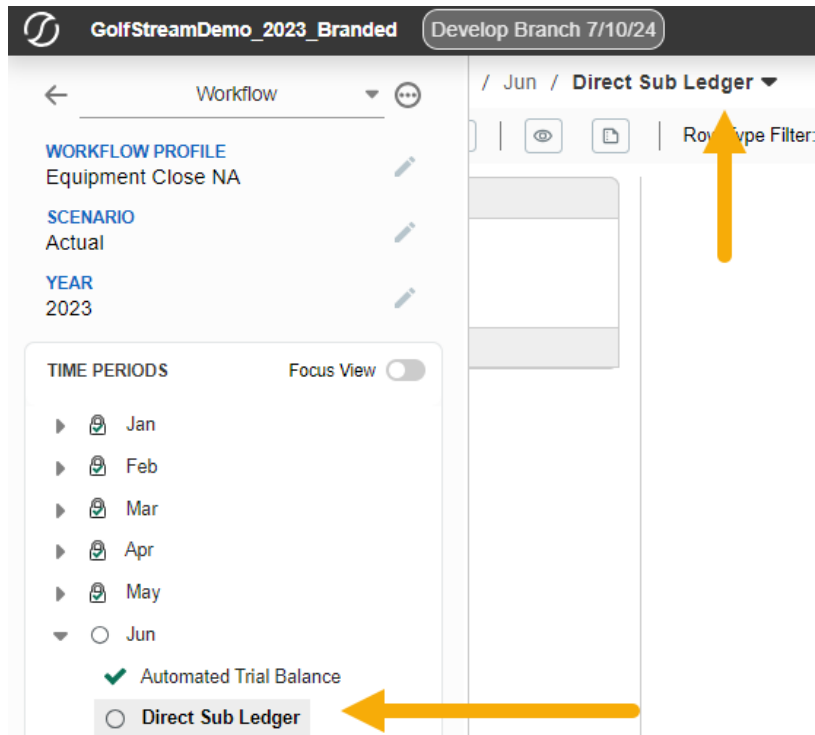
Label	Windows Application	Browser UX
Complete		
Disabled		
Error		
In Progress		
Input Form Started		
Last Step Complete		
Last Step Disabled		
Last Step Error		
Last Step in Progress		
Optional Workflow Complete		
Completed and Closed		
Completed and Locked		
Incomplete Closed		
Incomplete Locked		

Workflow Breadcrumbs

You can navigate to a specific month, time period, scenario, or workflow step of your choosing from the workflow navigation feature. Selecting an option will take you to the corresponding step. A new dropdown in the Workflow page title bar allows users to quickly toggle between Workflow Steps in a Time Period.



Workflow



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
- Time Range Periods
- View Transformation Rules

- Analysis Area
- Application Configurations
- Intercompany Matching
- Multi-Period Processing
- View Processing Log
- View Source Document
- Time Period Actions
- Dependent Actions

Notable Differences from Windows Application

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

Amount	HoustonEntities	Time	View	HoustonAccounts	Flows	IC	CostCenters
86,400,000.00	Houston Heights	2018M1	YTD	[Bypass]	None	None	None
3,392,089.14	Houston Heights	2018M1	YTD	10100	None	None	None
3,870,484.16	Houston Heights	2018M1	YTD	10300	None	None	None
3,561,084.46	Houston Heights	2018M1	YTD	10400	None	None	None
11,839,604.09	Houston Heights	2018M1	YTD	11000	None	None	None
1,600.00	Houston Heights	2018M1	YTD	11200	None	Carlsbad	None
3,200.00	Houston Heights	2018M1	YTD	11200	None	Montreal	None

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

Status	Rule Name	Rule Text	Tested	Passed	Failed
✓	Balance	Assets-Liabilities-Shareholders Equity must = 0	2	2	0
⚠	Cash Overdraft Reclass	Cash Deposits must be > 0, Overdraft must be reclassified to AP Trade.	2	0	2
✓	Bank Statement Required	Bank Statement must be attached, if Cash Deposits are > 0	2	2	0
⚠	Headcount Import	Headcount must be > 0	2	0	2
⚠	Headcount Check Sum	Headcount Check Sum must = 0	2	0	2

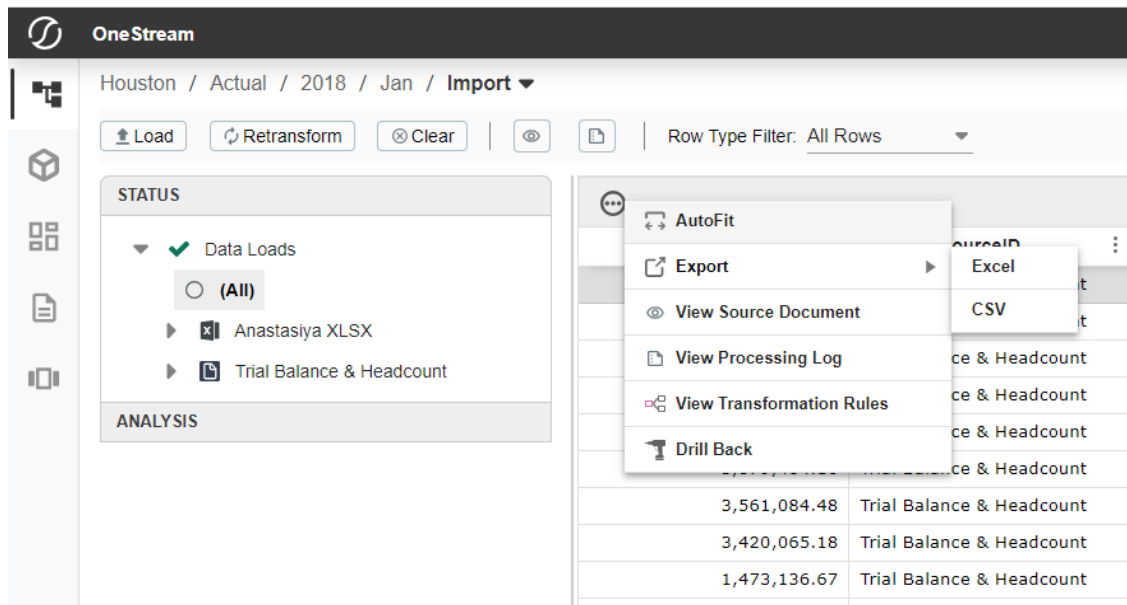
Status	Entity Name	Amount	Error Message	Information 1	Information 2	Information 3	Information 4
✓	Houston Heights	00.00					
✓	South Houston	00.00					

- 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.



Workflow

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

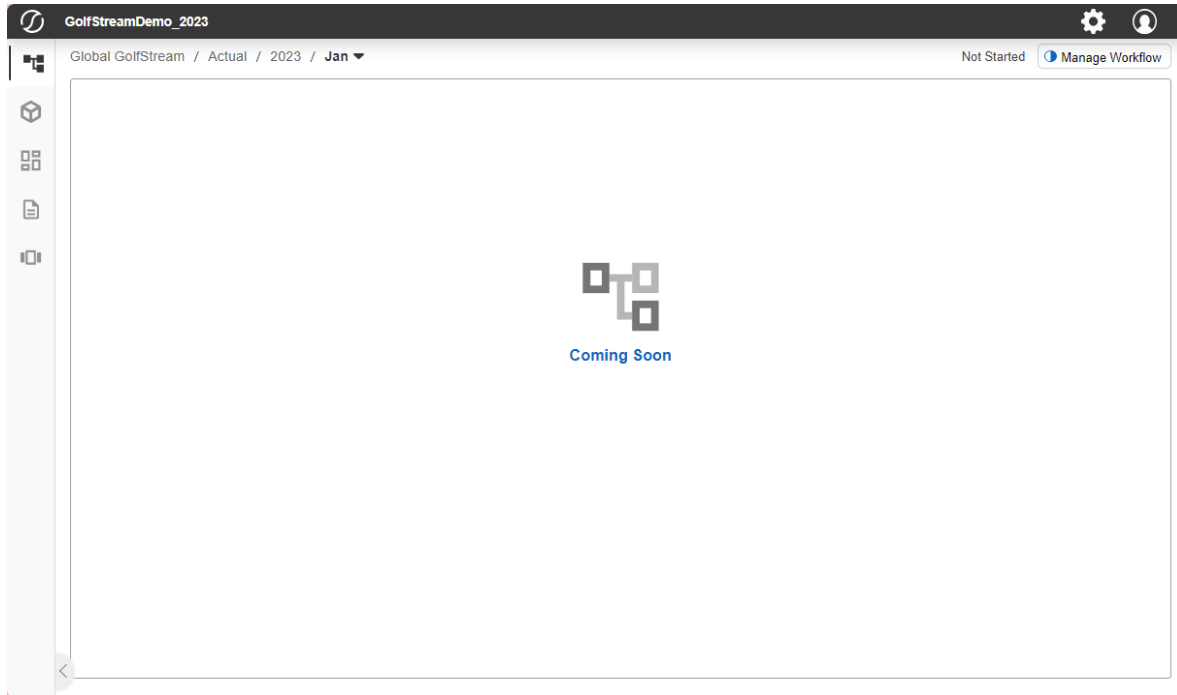
- Manage Workflow

General Workflow Functionality

- Edit Transformation Rules

Navigating Workflow Step Gaps

Helpful tips have been added to the browser experience to identify unsupported workflow steps for both dashboard designers and end users. *ComingSoon* 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

Cube views are flexible reporting artifacts that enable cube data to be presented and edited in various ways by utilizing security, configuration, and formatting properties, member formulas, and calculations.

Nearly all cube view features provided in the Windows Application are available to users of the Modern Browser Experience. For cube views that utilize features or functionality that have not yet been implemented, or in cases when variations arise due to technical differences between desktop and web-based applications, there may be configuration changes or workarounds that can be leveraged until functional gaps can be closed.

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 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. 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.

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.

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.

User Experience Differentiators

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: The modern browser experience 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

Browser 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. 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 browser capabilities move toward comprehensive end user dashboard functionality and matching rendering between the Windows Client and the browser experience, 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 use with a single configuration. However, for an optimized user experience on the browser 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 browser) or device (PC, tablet, or phone), a new configuration has been added to the Dashboard Profile called Client/Device Visibility.

[-] General (Dashboard Profile)	
Name	Adaptive Dashboard
Description	
Client/Device Visibility	WinApp
Visibility	WinApp
[-] Security	
Access Group	WinApp, Web
Maintenance Group	WinApp, Tablet
	WinApp, Phone
	WinApp, Web, Tablet
	WinApp, Web, Phone
	WinApp, Tablet, Phone
	WinApp, Web, Tablet, Phone

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. Dashboards always render in Workflows.

Supported Dashboard Functionality

Dashboard Layouts

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

Dashboard Components

- Advanced Charts
- BI Viewer
- Book Viewer
- Button
- Image
- Label
- Large Data Pivot Grid
- List Box

Dashboards

- Check Box
- Combo Box
- Cube View
- Data Explorer
- Data Explorer Report
- Date Selector
- Embedded Dashboard
- File Viewer
- Gantt View
- Grid View
- Logo
- Pivot Grid
- Radio Button Group
- Report
- SQL Table Editor
- Supplied Parameter
- Text Box
- Text Editor
- Text Viewer
- Tree View

General Dashboard Functionality

- Actions
- Extensible Documents
- User Supplied Parameters

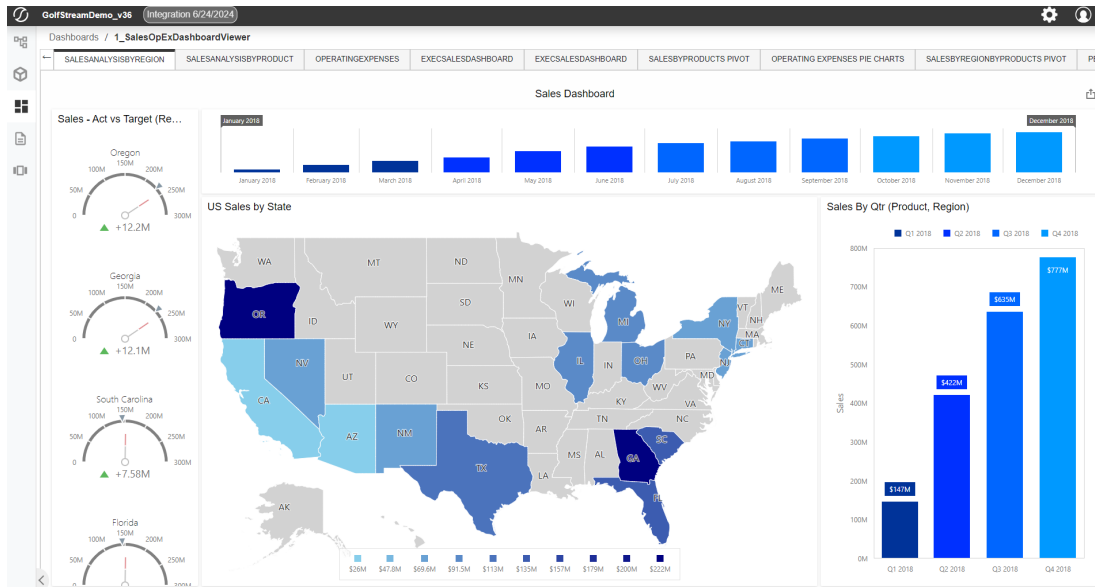
Notable Differences from Windows Application

Dashboard Components

BI Viewer

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

Dashboards



BI Viewer sometimes shows infinite loading screens in Browser that are driven by differences in how the component reads configurations.

Impacted Component	Observed Behavior	Cause	Resolution
BI Viewer	Infinite Loading Screen Appears	A filter is set to a question mark (?).	Update the filter to be set to an empty string. Validated in browser and WinApp.
BI Viewer	Infinite Loading Screen Appears	A Calculated Field is set to a decimal without a leading zero. (Example: .2).	Update the filter to include a leading zero. (Example: 0.2) Validated in browser and WinApp.

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)

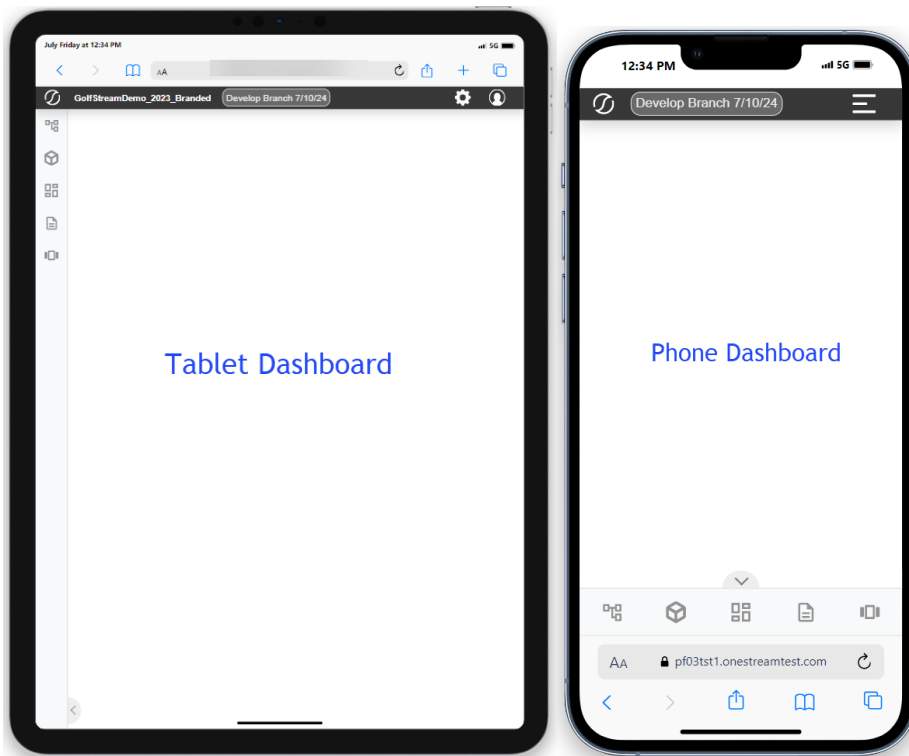
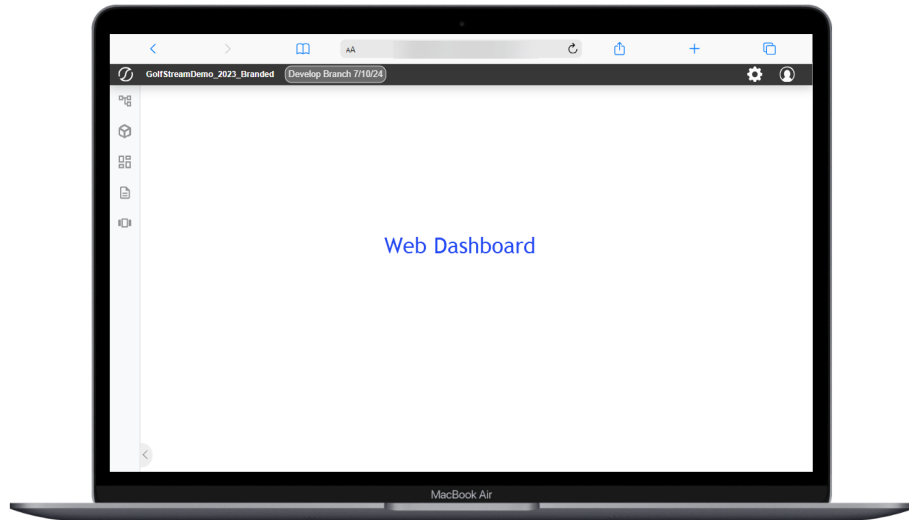
Dashboards

Component Properties	
[-] General (Component)	
Name	emb_Controls
Workspace	Default
Maintenance Unit	Add Dimension Member (ADM)
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)



Windows Client Dashboard

Dashboards



Grid View

Grid options are now listed in a context menu.

Grid Keyboard Functionality

The browser experience includes basic keyboard shortcuts. See [Appendix A](#) for more information.

Large Data Pivot Grid & Pivot Grid

Pivot Grids in the browser 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






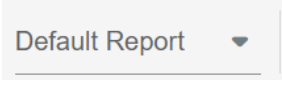

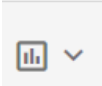
Field Controls are displayed in a floating dialog and launch using the *Show Fieldlist* button in the upper right corner of the pivot grid.

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.

Sum of RPT_Amt	Drop filter here	Drop column here	Total Rows
TimeStamp	Total Sum of RPT_Amt		Total Rows: 50,000
2021-06-03T05:21:44			204,150.68
2021-06-03T05:21:45			1,213,005.02
2021-06-03T05:21:46			2,415,890.29

Dashboards

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

Dashboards

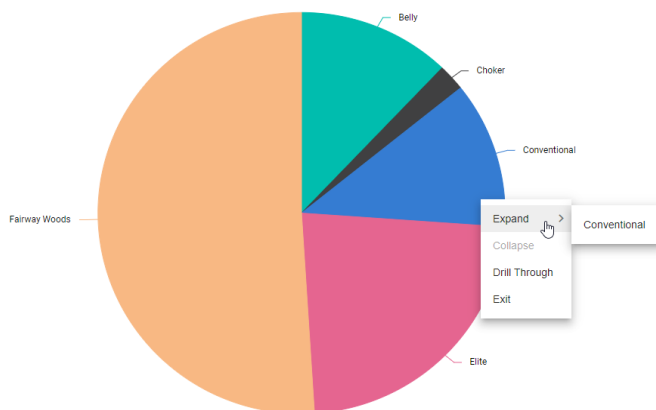
	Export
	Subtotals
	Grand totals
	Formatting

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.

- 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

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

Create Calculated Field [X]

Total Order Stock

Drag and drop fields to formula

- 2011M1 (Sum) >
- 2011M10 (Sum) >
- 2011M11 (Sum) >

Formula

Example: ("Sum(Order_Count)" + "Sum(In_Stock)") * 250

Format

Standard

Enter custom format string

OK CANCEL

Advanced Charts

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

Text Editor

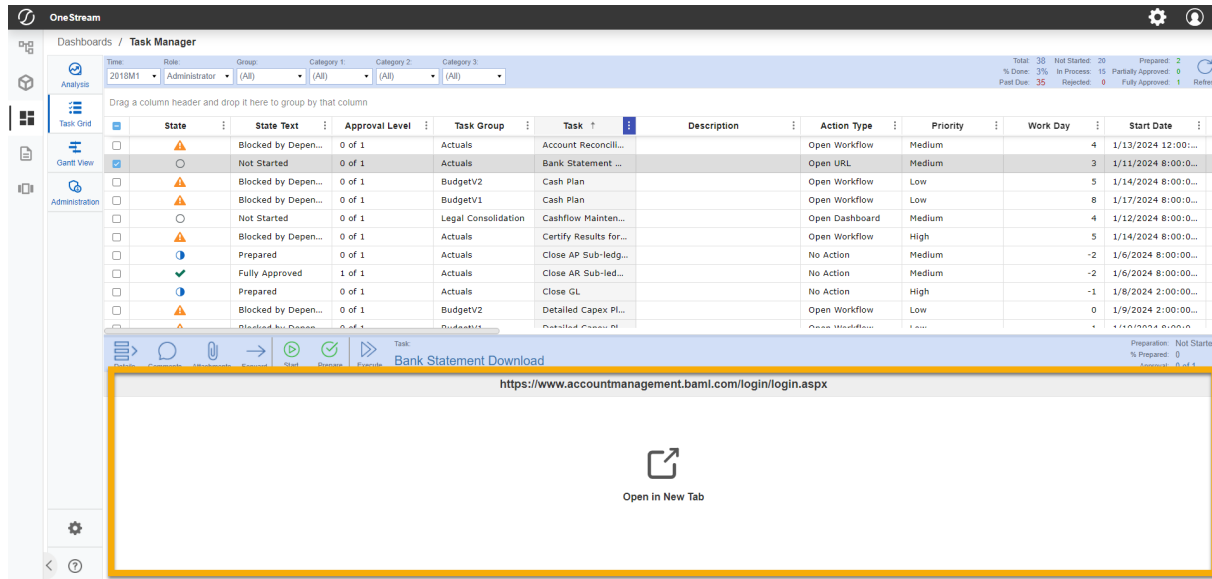
The text editor feature mirrors almost all of the windows application functionality including: create, save, open, edit, rich text editing, insert, and layout functions. Additionally, OneStream functions such as refresh documents, show field codes, and hide field codes. The main difference of this feature is the review tab is not currently available.

Spreadsheet

The Modern Browser Experience's Spreadsheet feature provides users with the ability to utilize spreadsheet functionality similar to the Excel Add-in directly through the browser. Spreadsheet behaves similar in the browser experience as it does the Windows Application. Refer to [Appendix C](#) for supported and unsupported functionality in Spreadsheet.

Web Content

You can use the Open in New Tab web component to access Web Content in a dashboard.



NOTE: It is recommended for users designing dashboards to navigate to the URL rather than using the web content component. This is limited to the browser.

Notable Dashboard Functionality Gaps

Dashboard Layouts

- Canvas
- Dock
- Wrap

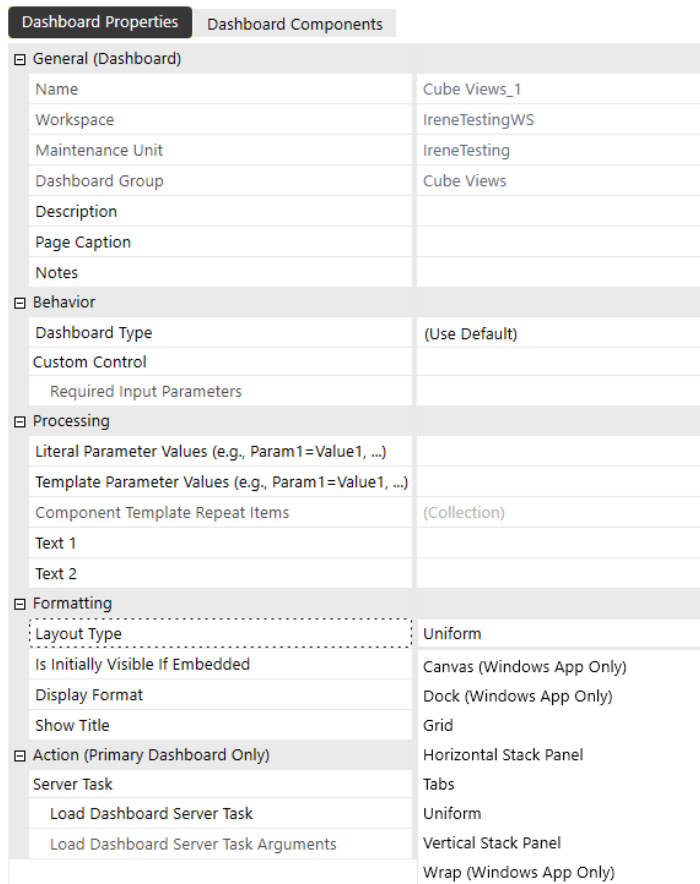
Dashboard Components

- Basic Charts
- Filter
- Map
- Password Box
- State Indicator
- Member Tree
- Sankey Diagram

Navigating Dashboard Gaps

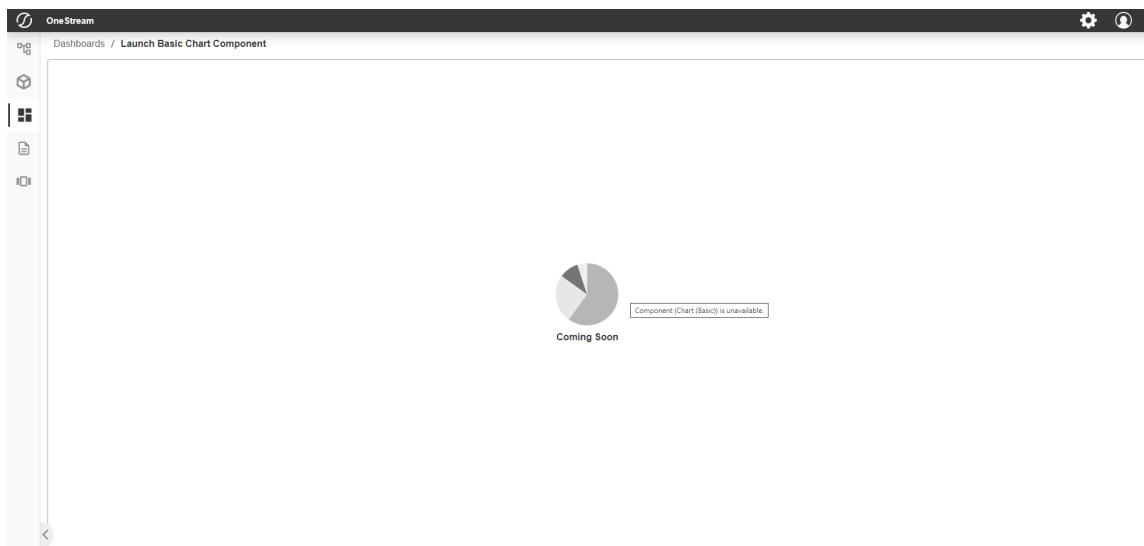
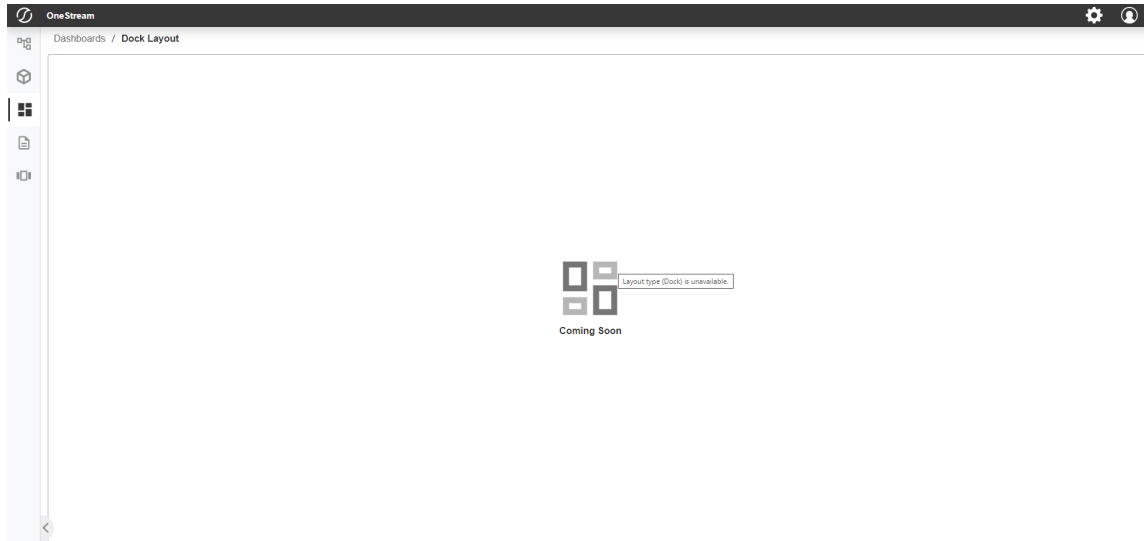
Helpful tips have been added to both the Windows Client and the modern browser experience to assist dashboard designers and end users in identifying dashboard layouts and components that are not yet supported on browser.

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



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



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 the browser to ensure functional parity before production use.

Dashboard Design Process

When building a dashboard for browser use, designers should open both their Windows and browser clients simultaneously. Using the Windows Client, designers can update and save dashboard configurations. To view reflected changes, 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 browser environment with the emulator properly sized to ensure the browser experience 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. The browser experience 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 initially. Designers can rely on this approach to update existing Windows Client dashboards for use. 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

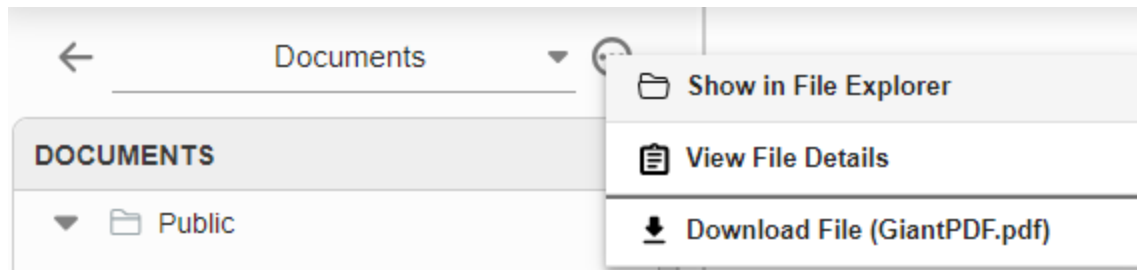
This approach uses a single adaptive dashboard. Designers need an initial understanding of how their dashboard should adapt to each client or device type intended for use. The designer creates Embedded Dashboards with configurations that link to client/device specific dashboards. The Embedded Dashboards 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 on the browser or alternative device types.

Documents

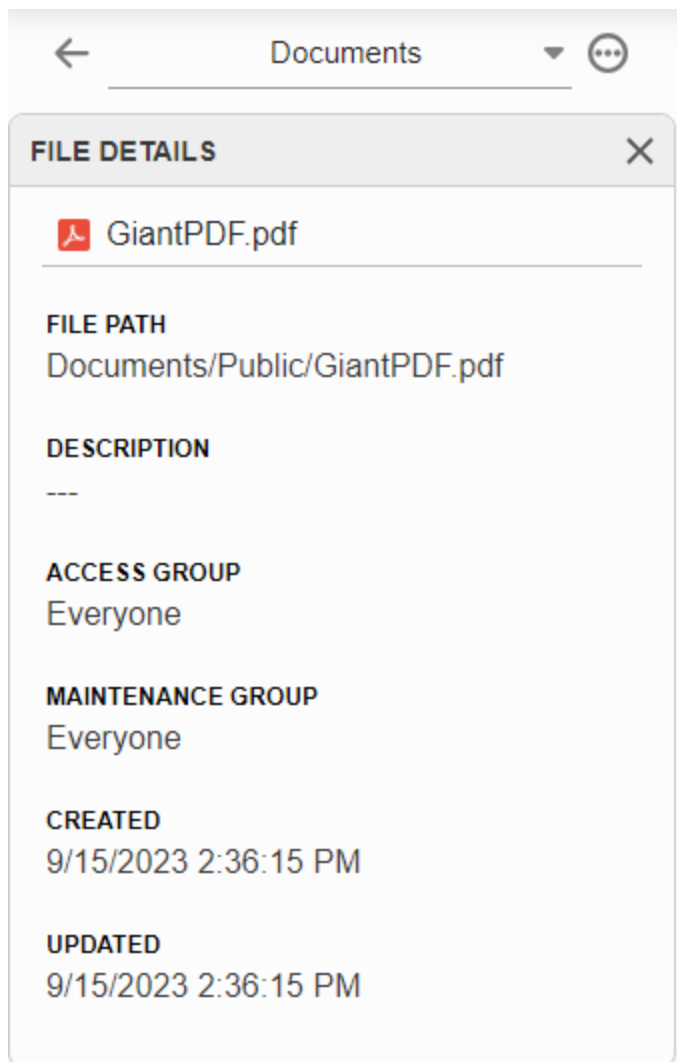
The Documents panel in the browser offers an intuitive interface has similar navigational patterns to the Windows Application. Files accessed through the browser are downloaded to the user's local machine, instead of being opened automatically in a native application. Additionally, a context menu has been implemented added at the top of the Documents area, which provides a button to download selected documents. This context menu also provides an button to open the File Explorer and to view File Details. The File Details can also be viewed by double-clicking the filename. When a folder is selected, the context menu dynamically provides options to open the folder in File Explorer and or view the Folder Details.

The specific POV used to view files and folders cannot be modified in the Documents panel, but can be applied through the File Explorer.



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



POV

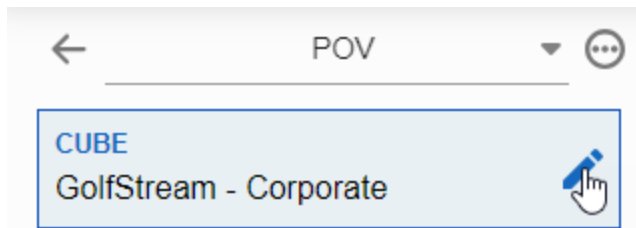
POV is in the OnePlace panel. To view and modify the current Cube POV, select the POV menu from the OnePlace panel. Similar to Workflow POV, the Cube POV Edit menu is displayed as an overlay menu, instead of a pop-up dialog. It's also important to note that information from the Windows Application POV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

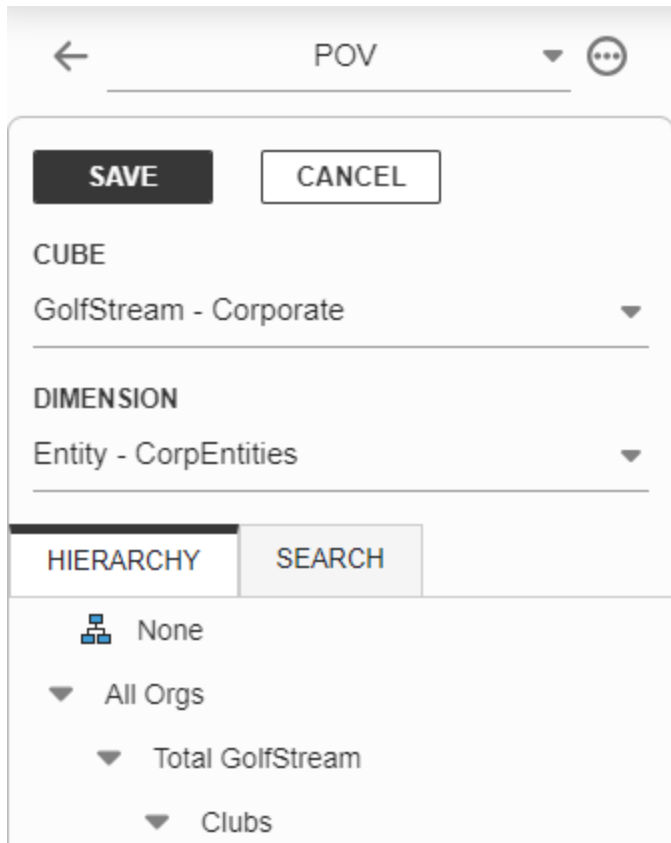
- **Global POV:** Select the gear icon in the header to view current Global POV settings.
- **Workflow POV:** Select Workflow in the OnePlace panel to view and modify the current Workflow POV.

Additional Features

Modify a POV

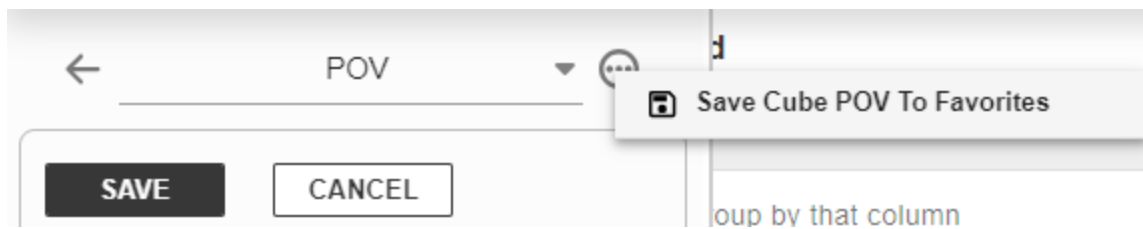
To modify a POV, click the pencil icon next to each field, make your modification, and click Save.





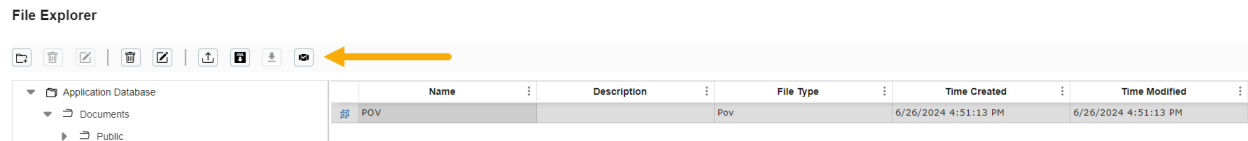
Save a POV

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. You must have an item with a File Type of POV selected to see the button. 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 browser experience 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 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
^	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

?	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

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.
Grouping Bar	
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

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 + Up	If the current active element is a dropdown list, the popup will be closed.
Esc or Escape	Closes the dropdown list.
Field List	
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

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

Esc or Escape	Closes the popup field list dialog.
Toolbar	
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.
Calculated Field	
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

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.
Drill Through	
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 left 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

Ctrl + Home	Goes to the first cell in the table.
Ctrl + End	Goes to the last 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.
Filter Dialog	
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

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

Scatter	Doughnut
Polar	Funnel
Spline	Pyramid

Appendix B: Advanced Charts

The following chart types are currently supported by the 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 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
-------	---

Appendix B: Advanced Charts

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

Appendix C: Spreadsheet Features and Functionality

Supported Spreadsheet Features and Functionality

Component Integration	<ul style="list-style-type: none">• Dashboards• Workflow Forms
Data Sources and Related Functionality	<ul style="list-style-type: none">• Spreadsheet Files<ul style="list-style-type: none">◦ Create, open, edit, and save• Cube View Connections<ul style="list-style-type: none">◦ Create, display, edit, and remove◦ Refresh data and submit changes• Table View Definitions<ul style="list-style-type: none">◦ Create, display, edit, and remove◦ Refresh data and submit changes• Retrieve Functions<ul style="list-style-type: none">◦ Supported Functions<ul style="list-style-type: none">◦ XGGetCell, XGGetCell5, XGGetFXRate, XGGetCalculatedFxRate, XGGetMemberProperty, XGGetRelationshipProperty, XGGetHierarchyProperty, XGGetMemberInfo XGSetCell

	<ul style="list-style-type: none"> ○ Refresh data and submit changes (XFSetCell only)
Ribbon Functions	<ul style="list-style-type: none"> • New (Create Spreadsheet) • Open (Local File, OneStream System File, Application Workspace File, System Workspace File) • Save As (OneStream System File, Application Workspace File, System Workspace File) • Refresh Sheet and Refresh Workbook • Submit Sheet and Submit Workbook

Unsupported Spreadsheet Features and Functionality

Charts	<ul style="list-style-type: none"> • Limited Chart Types • Color Customization
Functions	<ul style="list-style-type: none"> • Saving changes to data through Cube Views and Table Views • Macros • Solver • Sheet References • Document Properties • Context Menu Features and Functions • Insert Copied/Cut Cells

Appendix C: Spreadsheet Features and Functionality

	<ul style="list-style-type: none">• Keyboard Controls:<ul style="list-style-type: none">◦ Shift + End◦ Ctrl + PageUp / Ctrl + PageDown (does not set tab focus)◦ Ctrl + N (overwrites spreadsheet with unsaved changes)
Formatting	<ul style="list-style-type: none">• Preview Font Formats• Conditional Formatting• Cell Borders (last selection is reset after format is applied)

Appendix D: Supported Number Formats

The following Number Formats are supported:

