BrowserUX Early Access Programs Guide

Release 8.2

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Table of Contents

Disclaimer 1
About This Guide 1
BrowserUX Overview 2
Early AccessPrograms Description 3
Private Preview Program 3
Limited Availability Program 4
General Availability Launch 4
What's New in BrowserUX 8.2? 5
Workflow 5
Dashboard 5
Functional Capabilities 6
BrowserUX Implementation 7
Prerequisites for BrowserUX Implementation 7
System Requirements 7
Setup and Configuration 8
Authentication 8
Functional Capabilities of BrowserUX 9
General User Experience 9

Log in to BrowserUX 9
Log out of BrowserUX 10
Change Applications 10
Header 11
OnePlace Panel 11
Hide OnePlace Panel 11
Navigate OnePlace Panel Sections 12
File Explorer 13
Grids 13
Anchored Dialogs 14
Cancel Long-Running Tasks 15
Workflow 17
Navigation 17
Supported Workflow Functionality 20
Workflow Steps 20
General Workflow Functionality 20
Notable Differences from Windows Application 21
Notable Workflow Functionality Gaps 23
Workflow Steps 23
General Workflow Functionality 23

Navigating Workflow Step Gaps 23
Cube Views 25
Supported Cube View Functionality 25
Presentation 25
Toolbar Functions 25
Cube View and Cell-Level Context Menu Functions 26
Cube View Navigation 26
Cube View Drill Down 26
User Experience Differentiators 28
Notable Functional Gaps 28
Dashboards 29
Enabling Dashboard Access 29
Supported Dashboard Functionality 30
Dashboard Layouts 30
Dashboard Components 30
General Dashboard Functionality 30
Notable Differences from Windows Application 31
Dashboard Components 31
Notable Dashboard Functionality Gaps 39
Dashboard Layouts 39

Dashboard Components 40
Navigating Dashboard Gaps 40
BrowserUX Dashboard Design Process 43
Multi-client/Device Dashboard Design Approaches 43
Approach 1: Unified Multi-client/Device Dashboards 43
Approach 2: Client/Device Specific Dashboards 44
Approach 3: Client/Device Adaptive Dashboards 44
Documents 45
POV 47
Additional Features 47
Modify a POV 47
Save a POV 48
Set a Saved POV 49
Third-Party Component Technology 50
Appendix A: Pivot Grids 51
Calculated Fields Syntax 51
Keyboard Navigation in Pivot Grids 52
Chart Types in Pivot Grids 59
Appendix B: Advanced Charts 61
Configuration Properties 61

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 Adopter 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 AccessPrograms Description

Early Adopter 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.

What's 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.

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

Navigation	
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. .

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, refer to the following sections in the Installation Guide.

For information on prerequisites for self-hosted environments, refer to the Legacy Authentication section in the *Upgrade Guide for BrowserUX Early Adopter Programs* 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://browserux.yourcompany.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

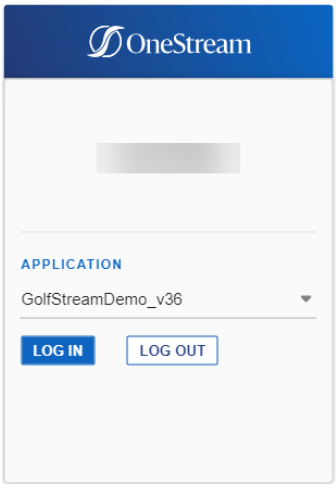
Learn how to navigate OneStream BrowserUX. This section explores general features and highlights notable differences between BrowserUX and Windows Application.

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.

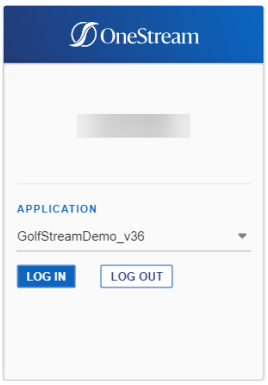
BrowserUX is accessed through a custom URL. For example, https://browserux.yourcompany.com/. To start the authentication process, input a Username and select Next. Once authenticated, BrowserUX will display a OneStream Home Page or, if multiple Applications are available, an Application Selector.



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

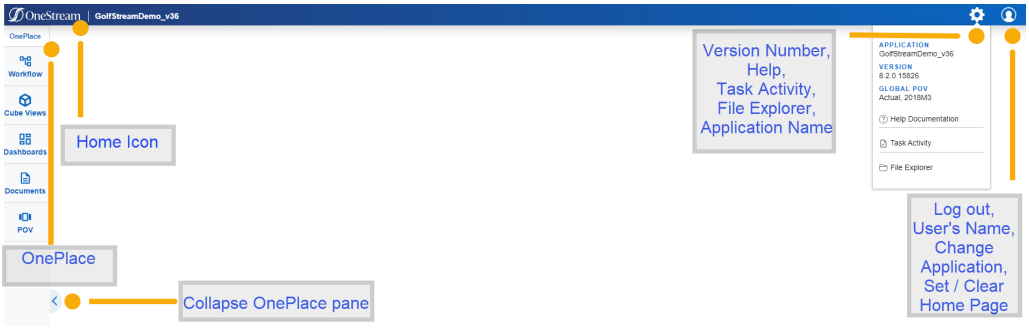
BrowserUX has a header and a OnePlace panel that persist throughout the user experience. Similar to the Windows Application, the header has a Home button embedded in the OneStream logo and displays the Application Name. Otherheader functionalityhas been moved to two menus in the top right corner of the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

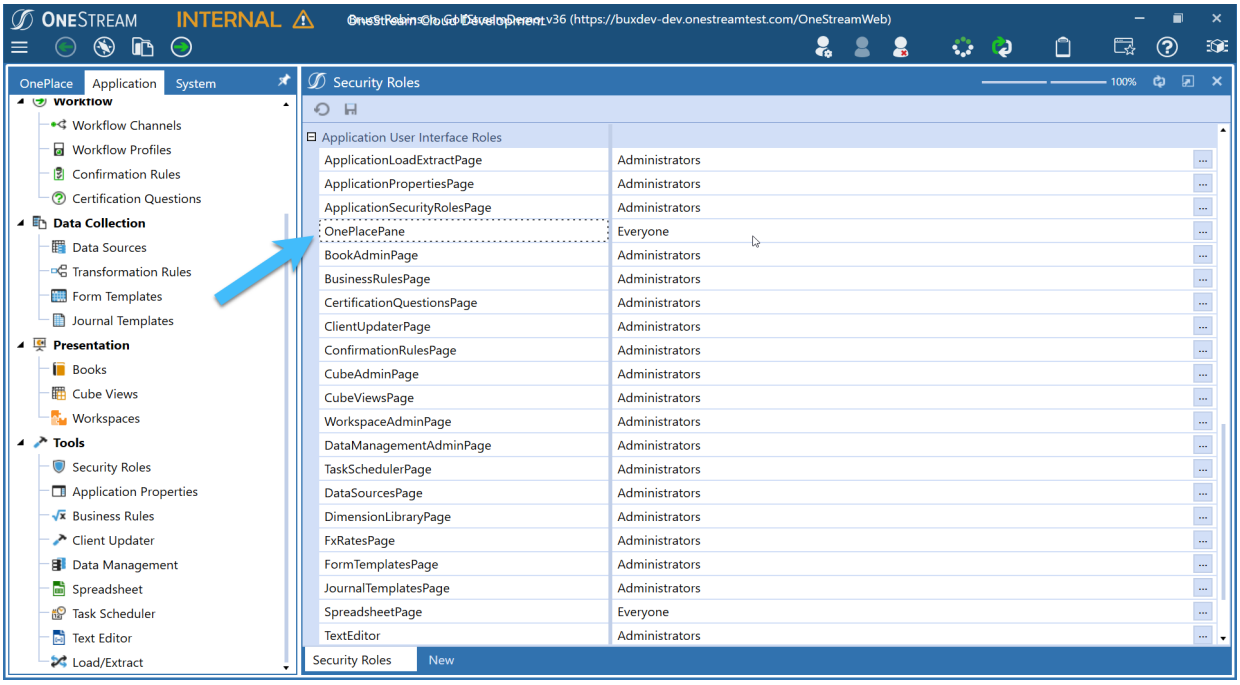
> **NOTE:** The OnePlace panel may be fully hidden for certain users using security settings.



OnePlace Panel

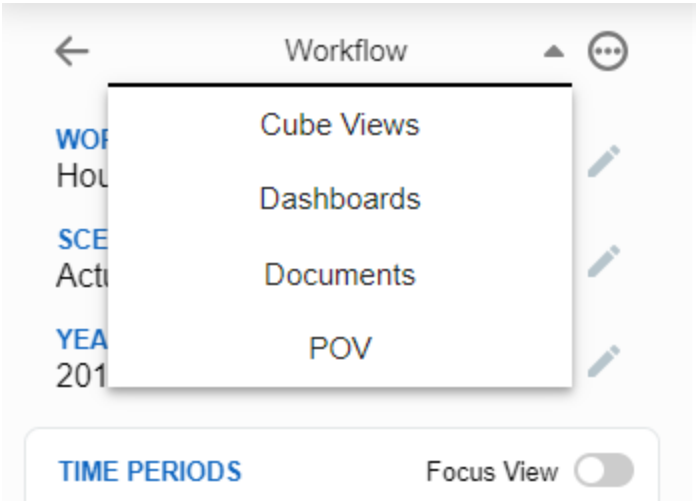
Hide OnePlace Panel

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



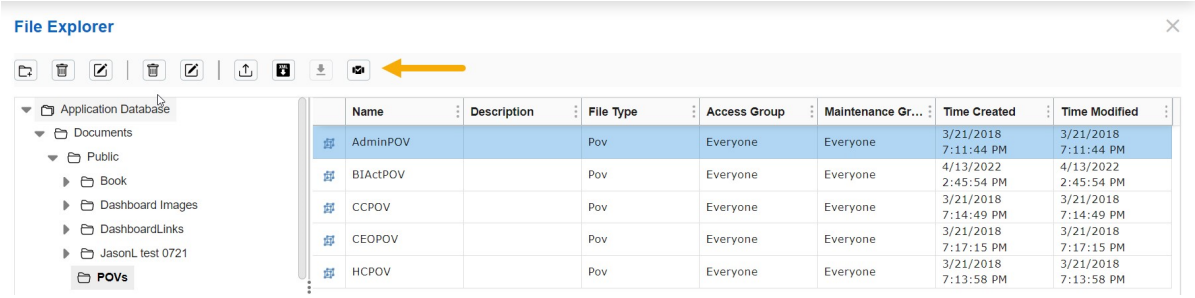
Navigate OnePlace Panel Sections

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



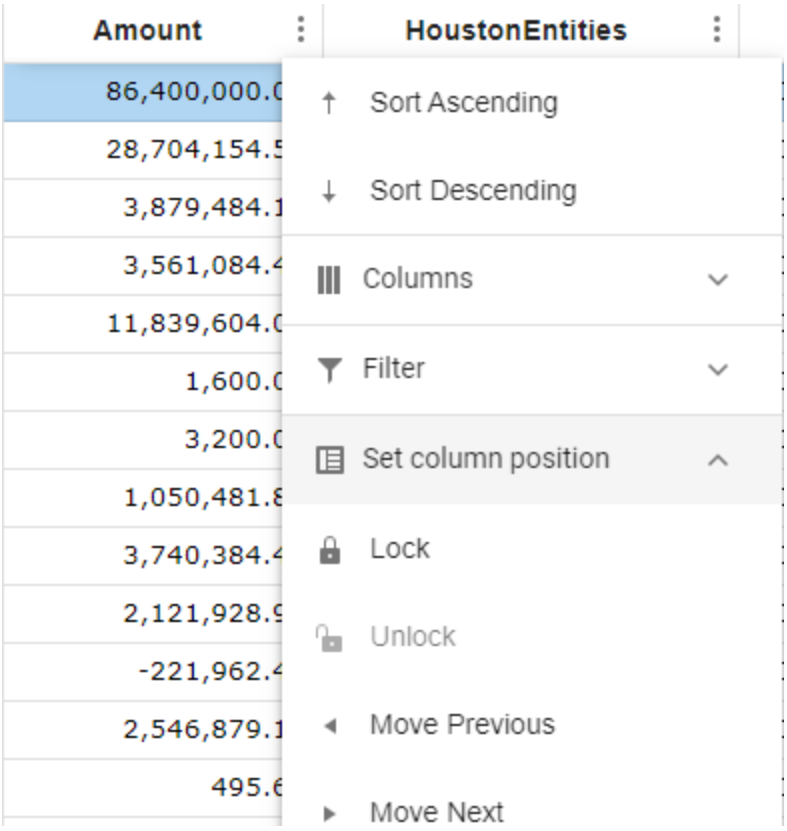
File Explorer

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.



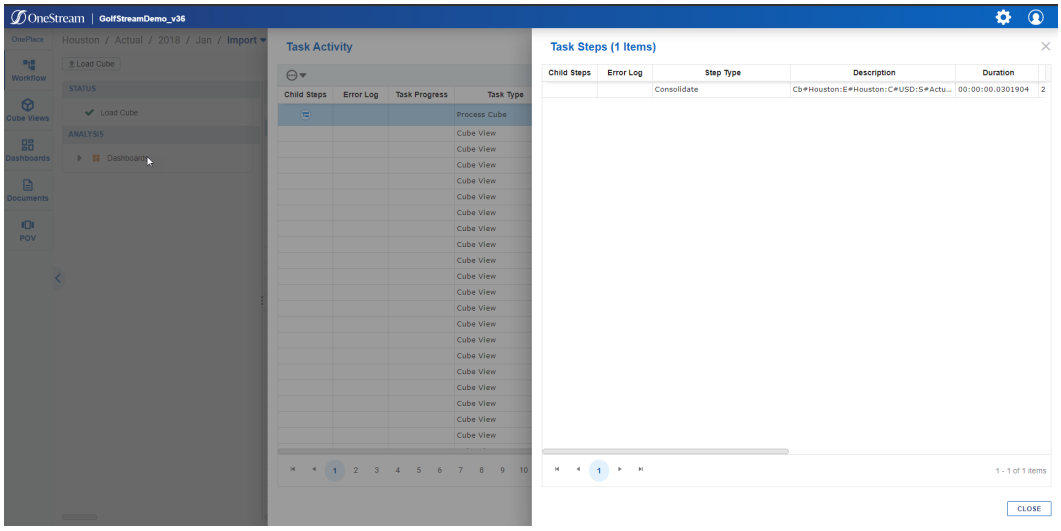
Grids

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.



Anchored Dialogs

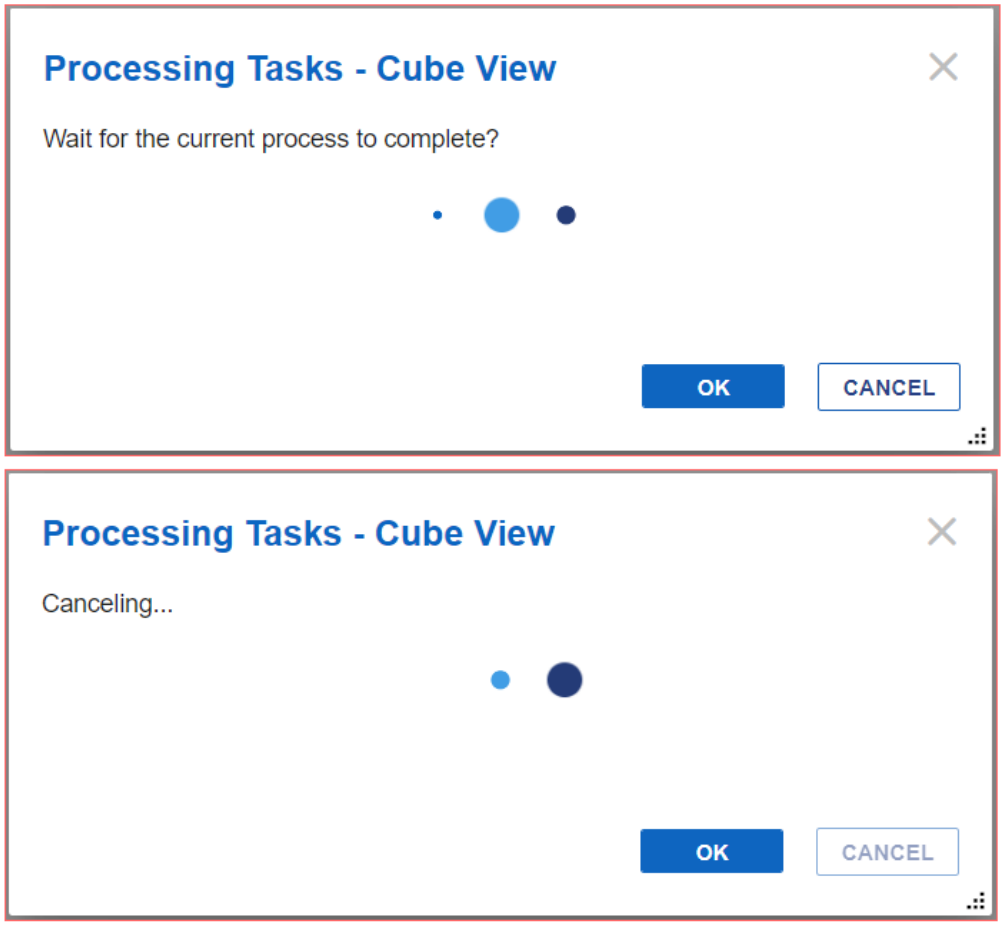
Many of the dialog boxes in BrowserUX display in a slide-out panel anchored to the right side of the page instead of the floating dialogs used in the Windows Client. This paradigm offers improved visibility and provides consistency for users accessing BrowserUX from various devices. Slide-out panels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



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.


Processing Tasks - Cube View
Wait for the current process to complete?
OK
CANCEL
Processing Tasks - Cube View
Canceling...
OK
CANCEL

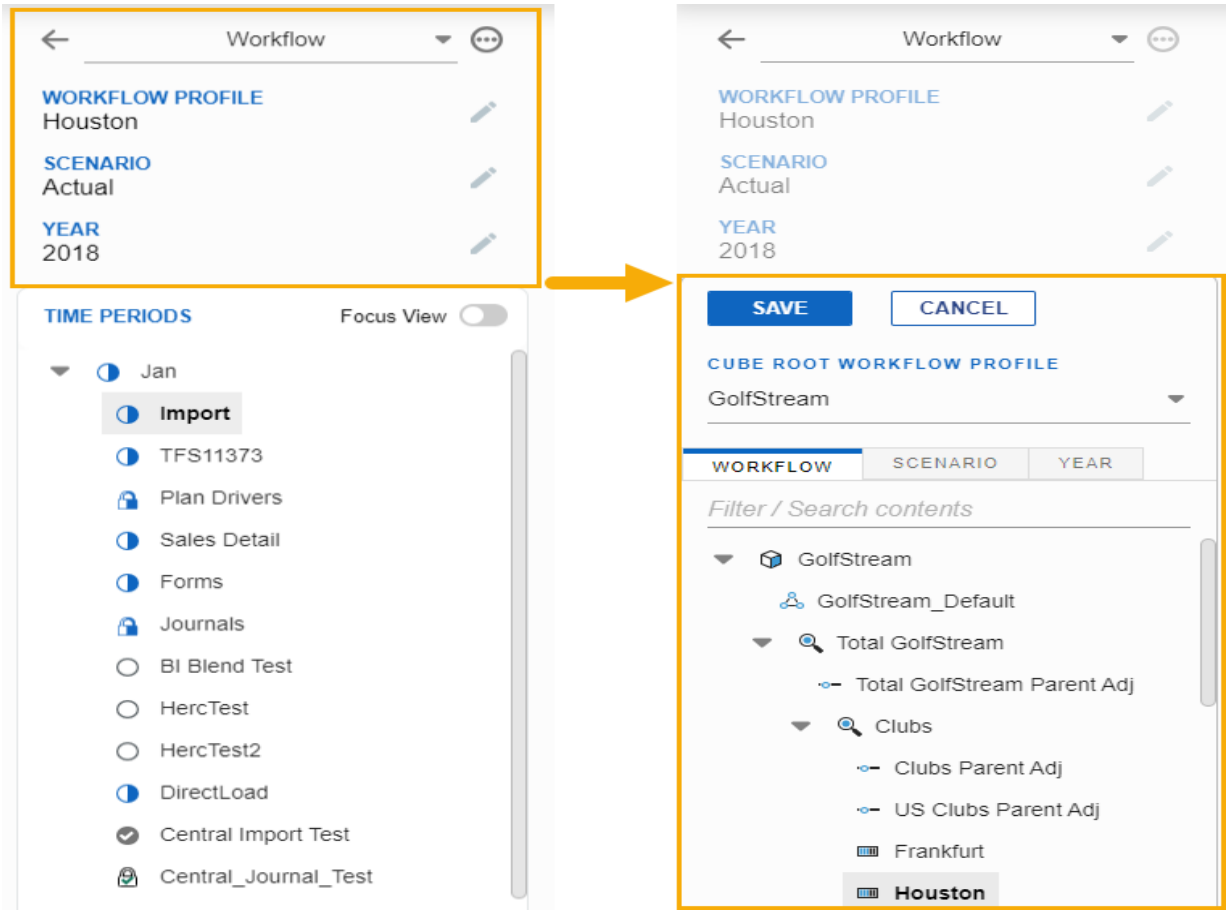
Workflow

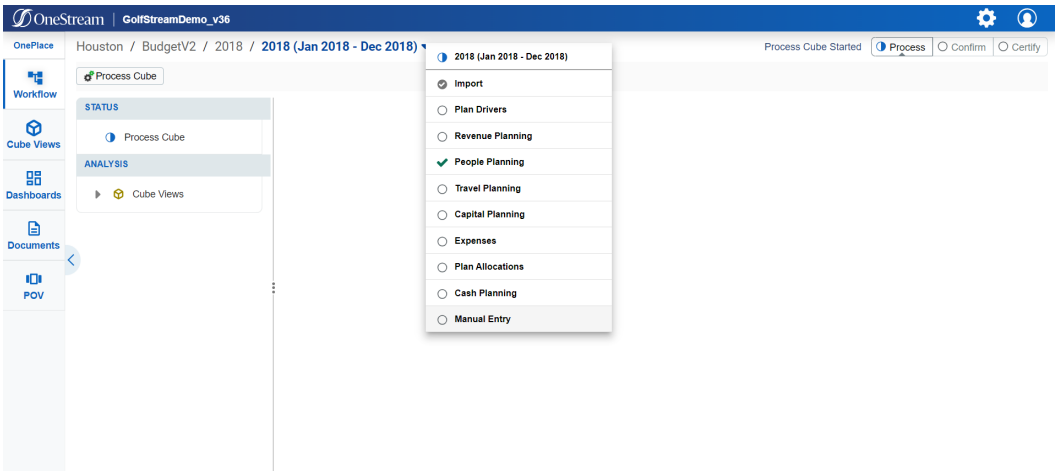
Workflow in BrowserUX delivers the same functionality and customizations offered in the Windows Application with a few notable exceptions mentioned below. Some tactical user experience improvements have been made, while primarily focusing on delivering the functionality of the workflow steps.

Navigation

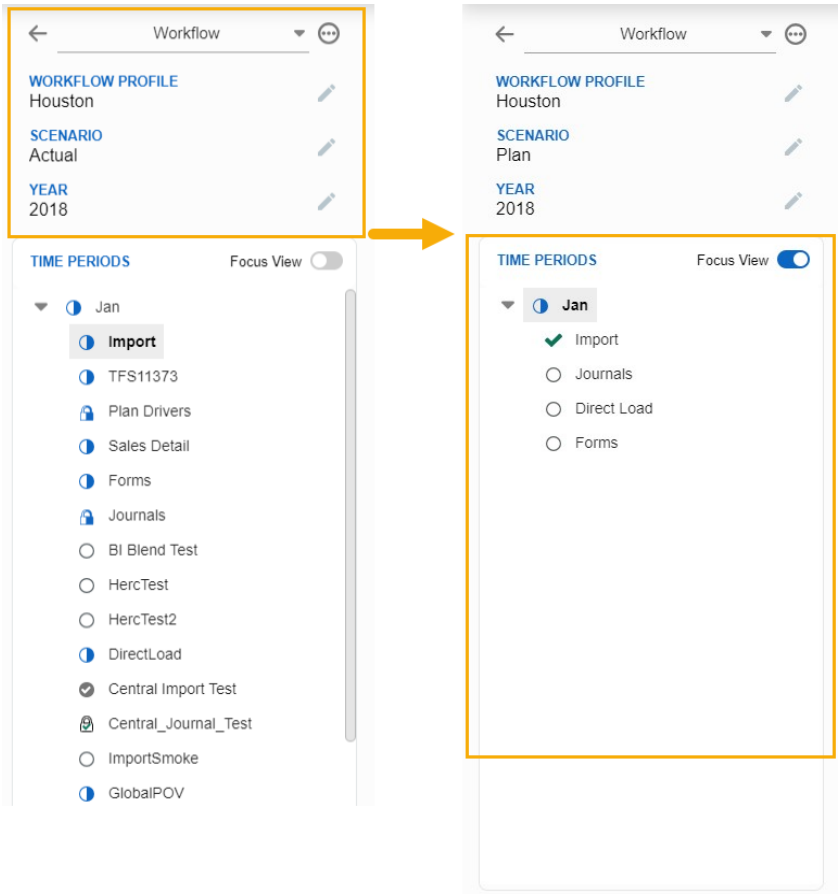
Similar to the Windows Application, Workflows are accessed through the OnePlace panel. Users are able to modify the Workflow POV by selecting the edit icon next to each dimension and navigate between Workflow Units under Time Periods. It is important to note a few differences between BrowserUX and the 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 PROFILE
Houston
SCENARIO
Actual
YEAR
2018
TIME PERIODS
Focus View
Jan
Import
TFS11373
Plan Drivers
Sales Detail
Forms
Journals
BI Blend Test
HercTest
HercTest2
DirectLoad
Central Import Test
Central_Journal_Test
Workflow
WORKFLOW PROFILE
Houston
SCENARIO
Actual
YEAR
2018
SAVE
CANCEL
CUBE ROOT WORKFLOW PROFILE
GolfStream
WORKFLOW
SCENARIO
YEAR
Filter / Search contents
GolfStream
GolfStream_Default
Total GolfStream
Total GolfStream Parent Adj
Clubs
Clubs Parent Adj
US Clubs Parent Adj
Frankfurt
Houston


OneStream | GolfStreamDemo_v36
OnePlace
Workflow
Cube Views
Dashboards
Documents
POV
Houston / BudgetV2 / 2018 / 2018 (Jan 2018 - Dec 2018)
Process Cube Started
Process
Confirm
Certify
Process Cube
STATUS
Process Cube
ANALYSIS
Cube Views
2018 (Jan 2018 - Dec 2018)
Import
Plan Drivers
Revenue Planning
People Planning
Travel Planning
Capital Planning
Expenses
Plan Allocations
Cash Planning
Manual Entry

- 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.

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

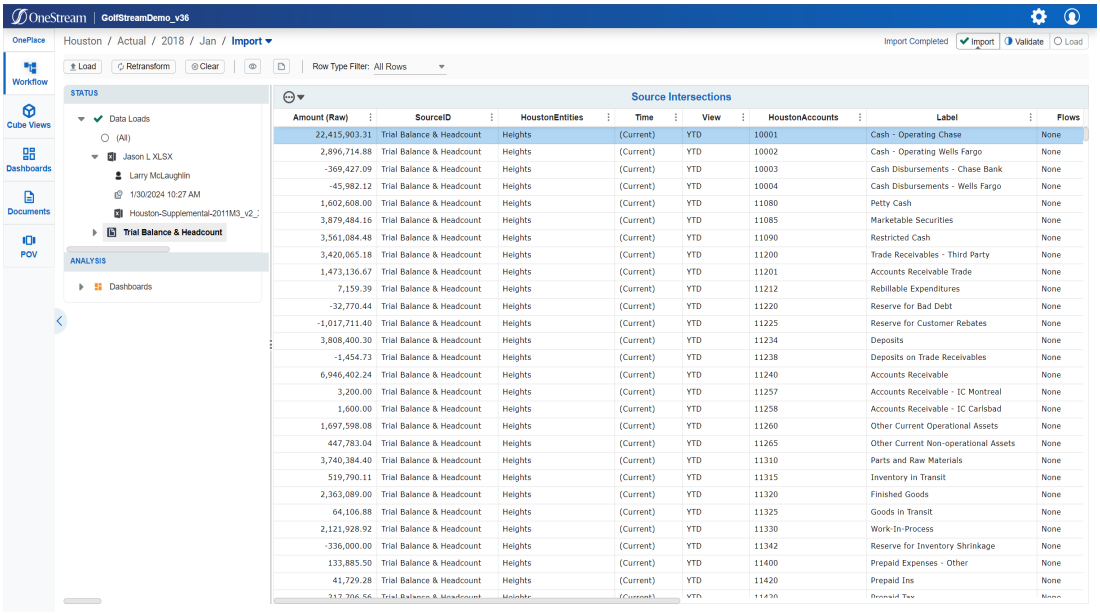
General Workflow Functionality

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

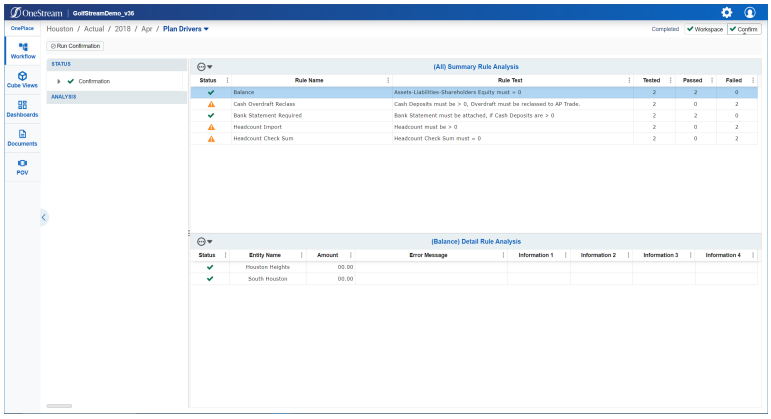
- Intercompany Matching
- Multi-Period Processing
- Time Period Actions
- Dependent Actions

Notable Differences from Windows Application

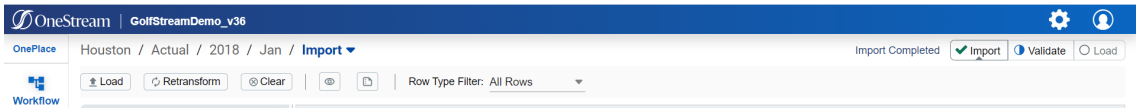
- Workflow Page Styling – Workflow Title, Workflow Steps, Grids, Status Area, and Analysis Area.



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

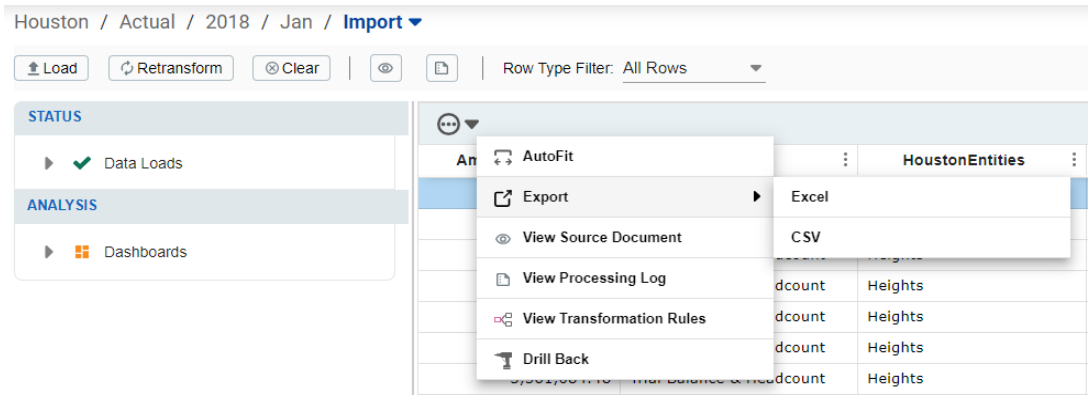


- Workflow Progress Buttons – Now displayed on the right side of the screen, the progress buttons have been updated with new icons and borders to improve visibility.



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.



Notable Workflow Functionality Gaps

Workflow Steps

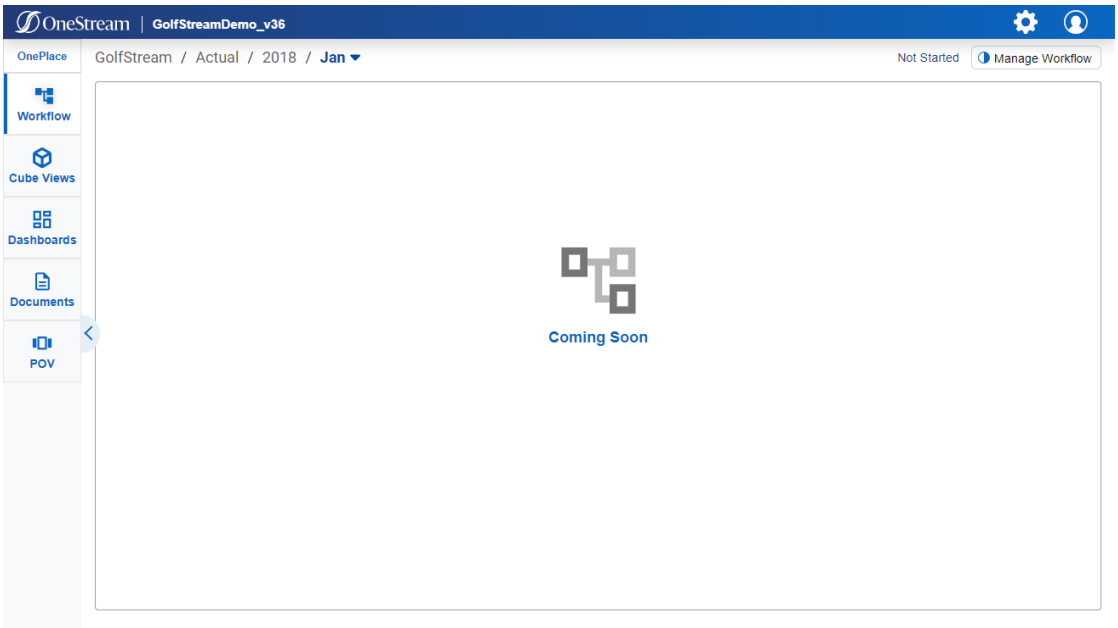
- Manage Workflow

General Workflow Functionality

- Edit Transformation Rules
- Journal Export
- Journal Entity Filter
- Journal Rename
- Journal Show Member Description
- 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

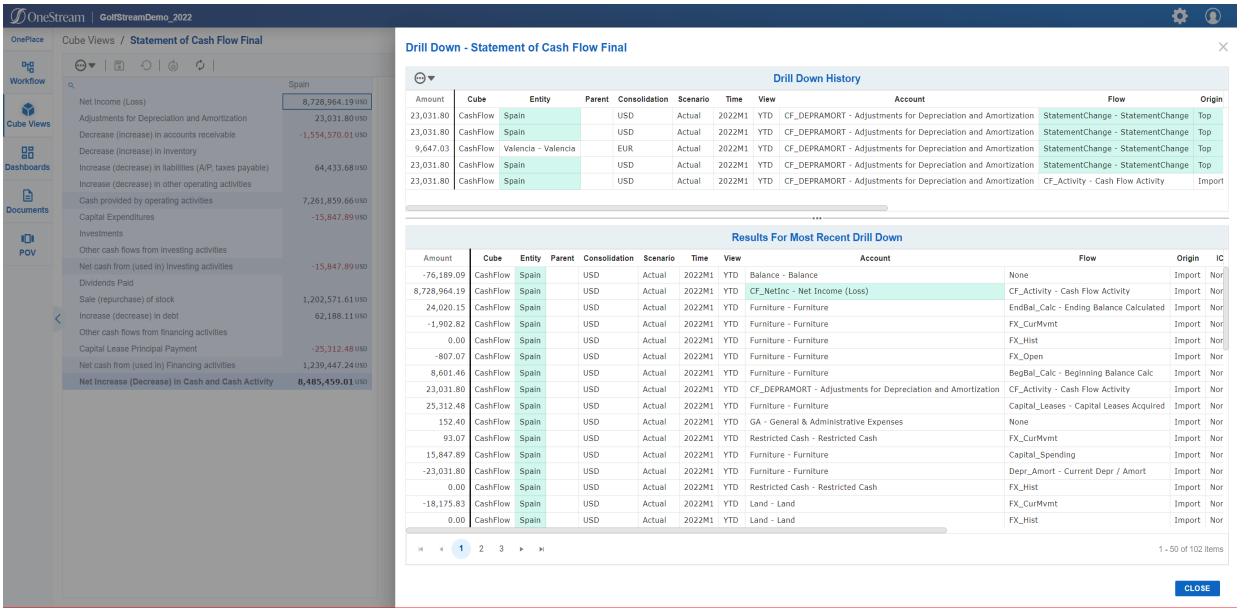
Cube View Navigation

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.

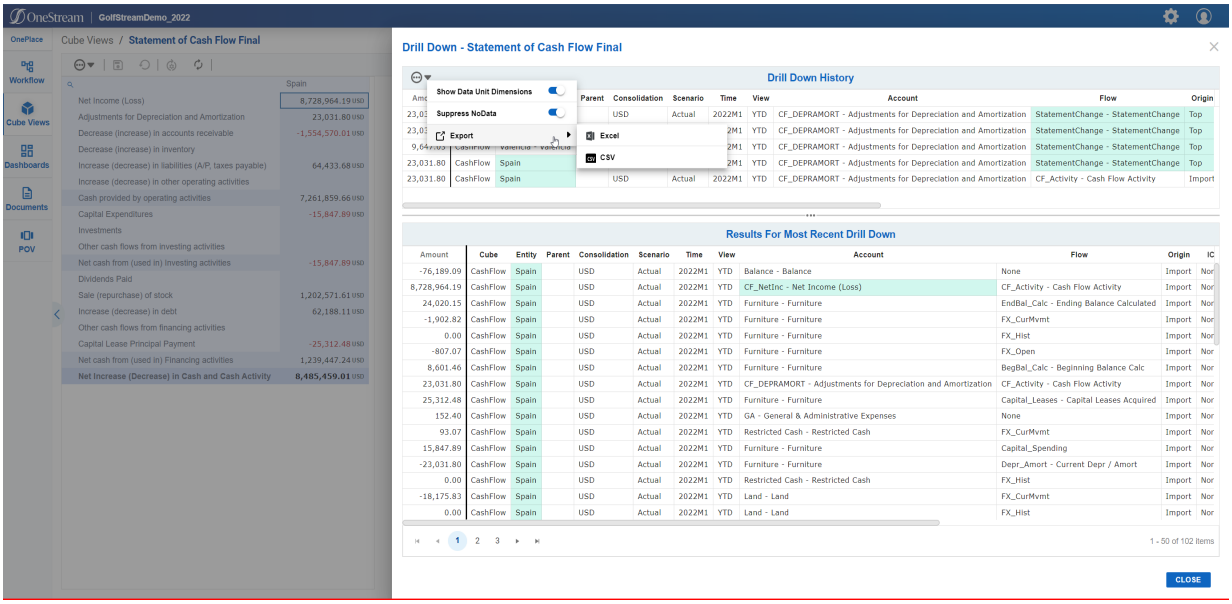
Cube View Drill Down

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.

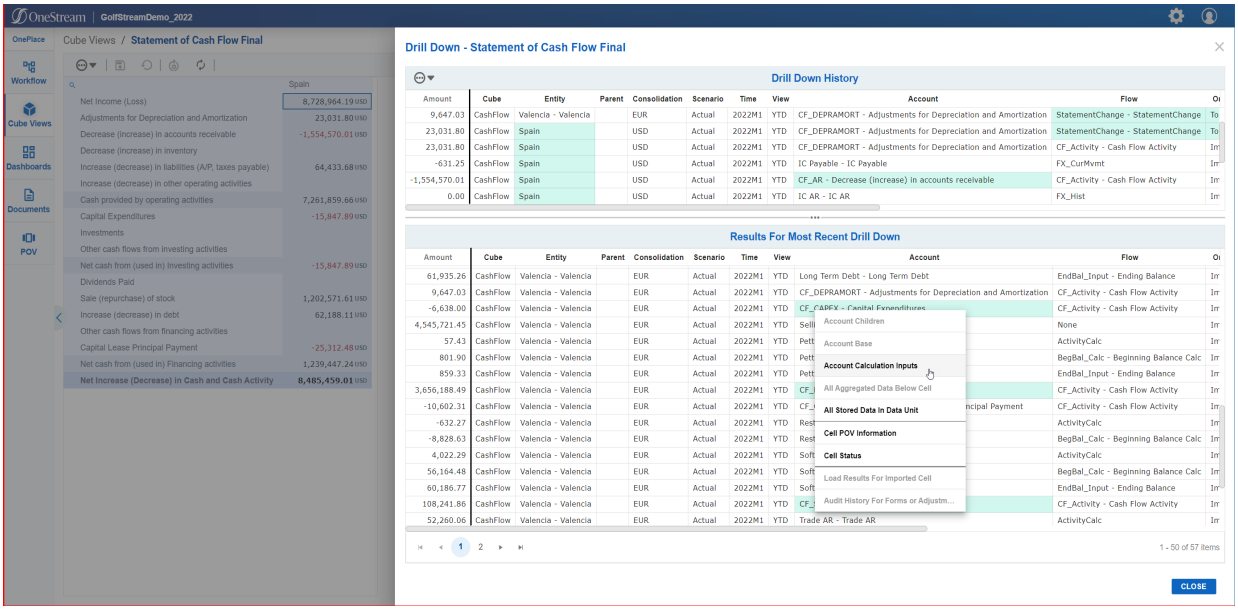
Currently, only the **Open** in Panel option is supported. The **Open** in **New Tab** option will be considered in a future release.



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

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

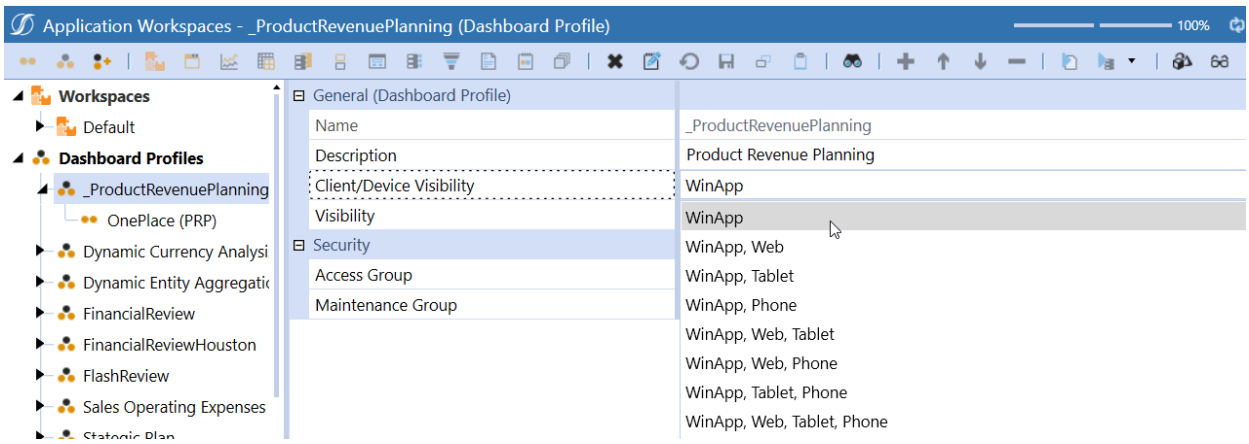
BrowserUX dashboards are expanding functional coverage with the goal of offering equivalent use of layouts and components available in the Windows Client. Currently, the most commonly used features are available in BrowserUX. For dashboards that contain elements that have not been delivered or potential 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.



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

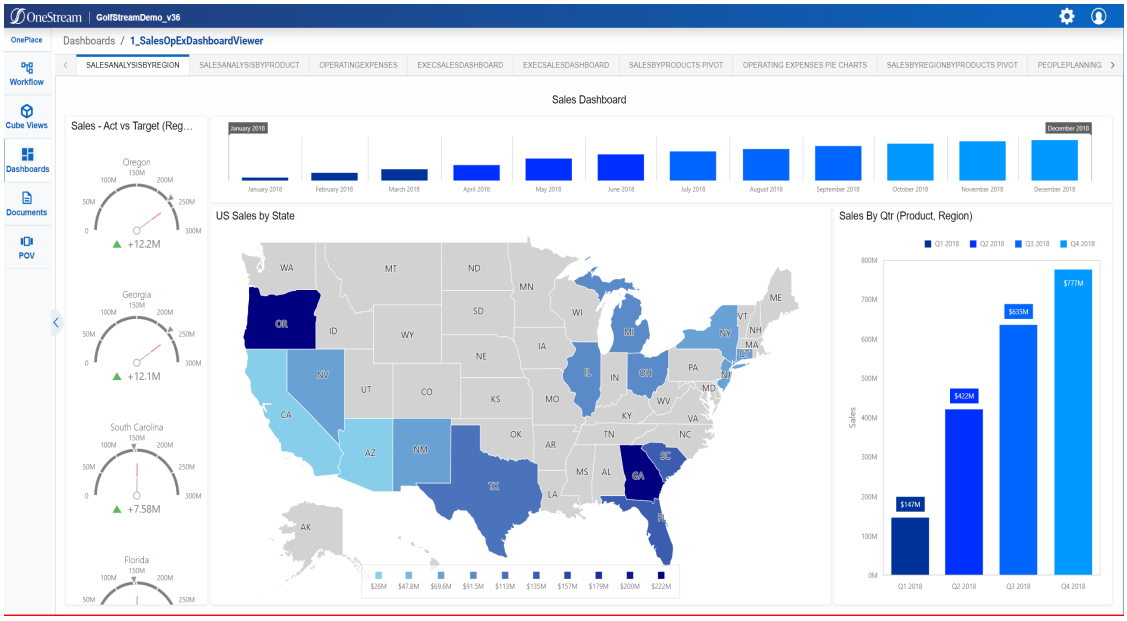
- User Supplied Parameters

Notable Differences from Windows Application

Dashboard Components

BI Viewer

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

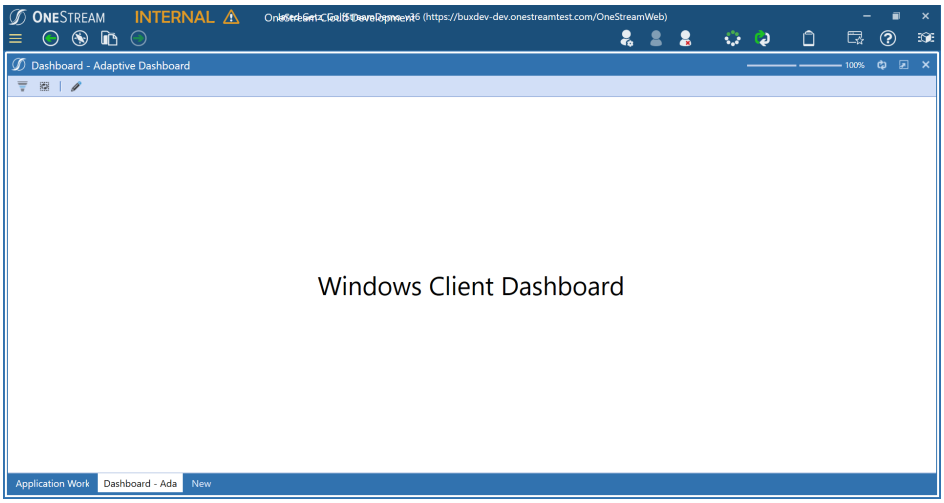


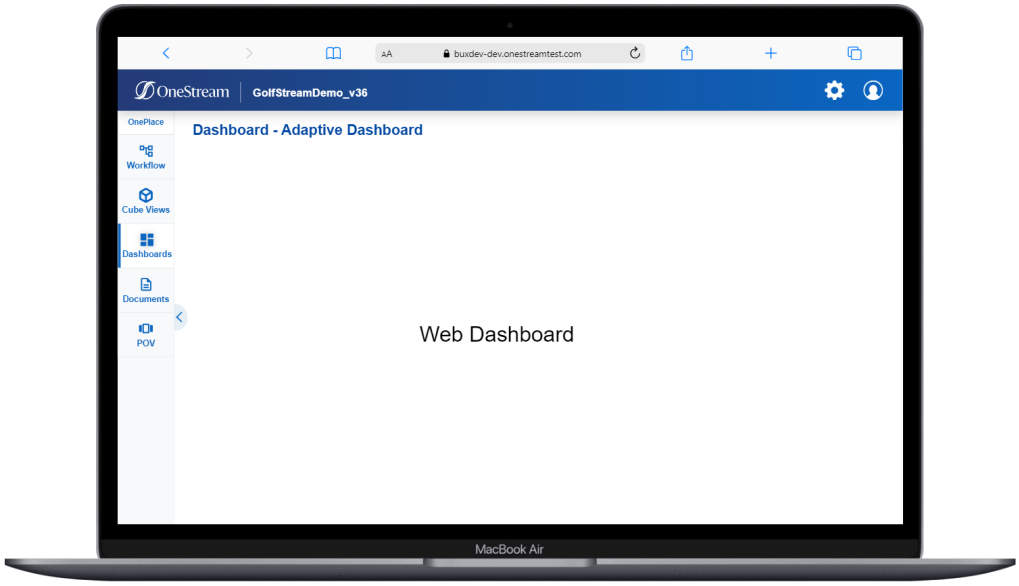
Embedded Dashboards

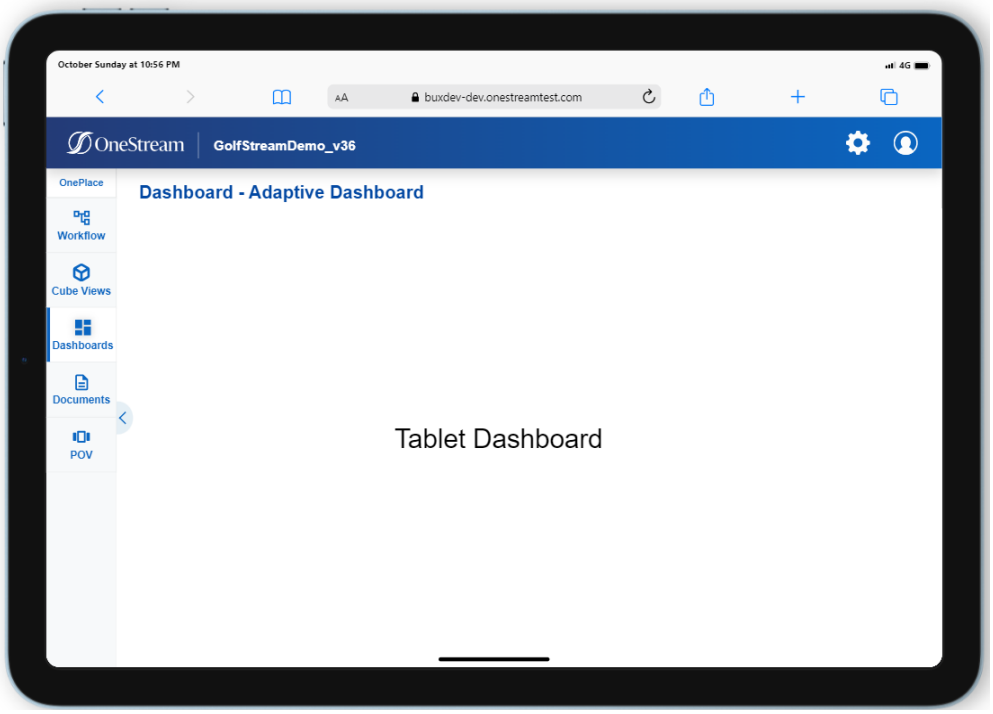
New client/device specific dashboards configurations allow a single root dashboard to render different embedded dashboards depending on the client or device type. (More details on the use of this configuration are described within the Multi-Client/Device Dashboard Design Approaches below)

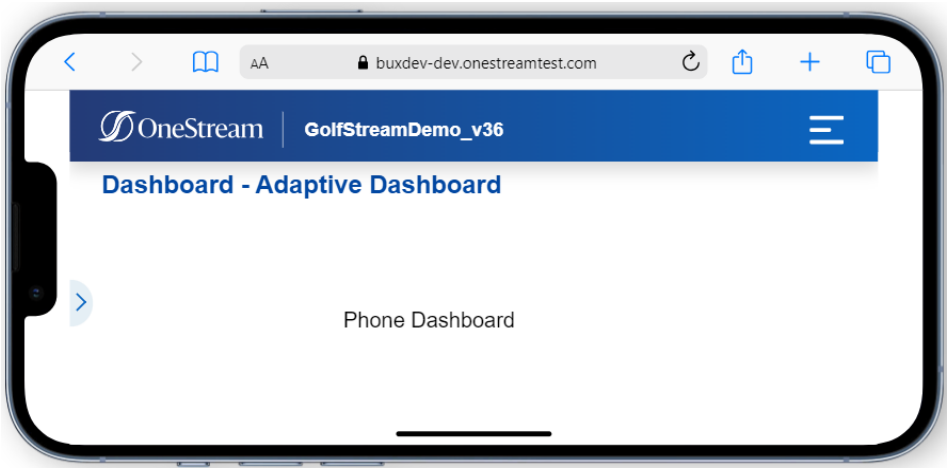
Component Properties

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)



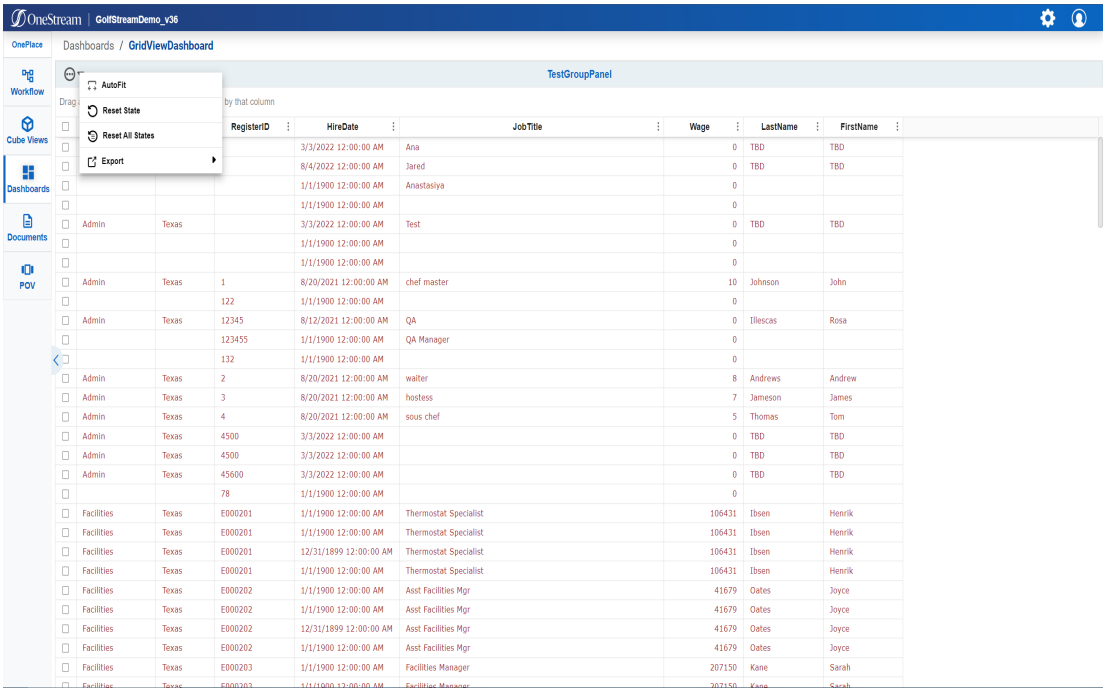

buxdev-dev.onestreamtest.com
OneStream
GolfStreamDemo_v36
OnePlace
Workflow
Cube Views
Dashboards
Documents
POV
Dashboard - Adaptive Dashboard
Web Dashboard
MacBook Air


October Sunday at 10:56 PM
buxdev-dev.onestreamtest.com
OneStream
GolfStreamDemo_v36
OnePlace
Workflow
Cube Views
Dashboards
Documents
POV
Dashboard - Adaptive Dashboard
Tablet Dashboard



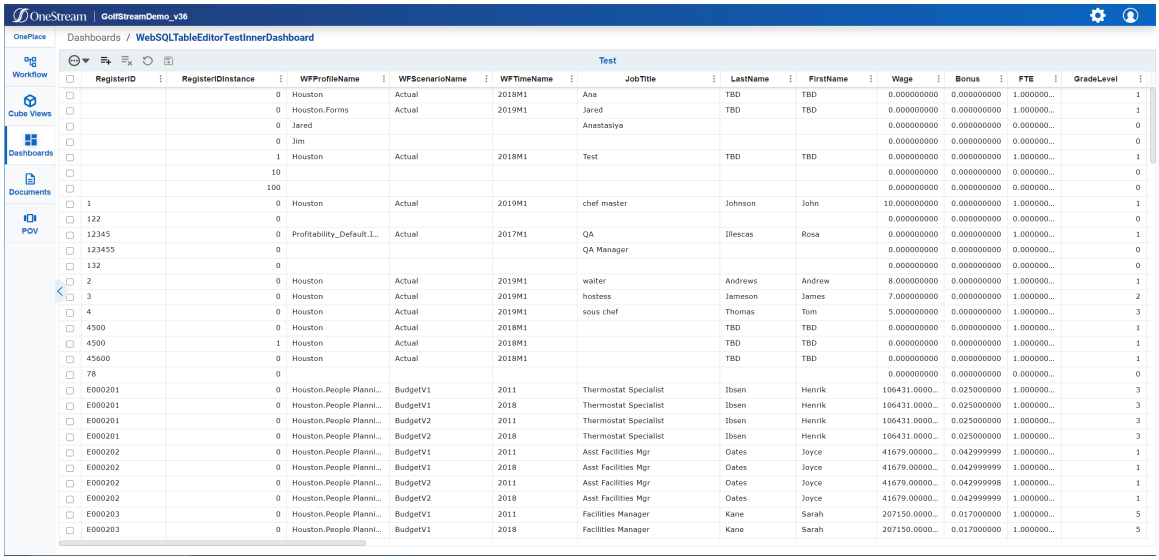
Grid View

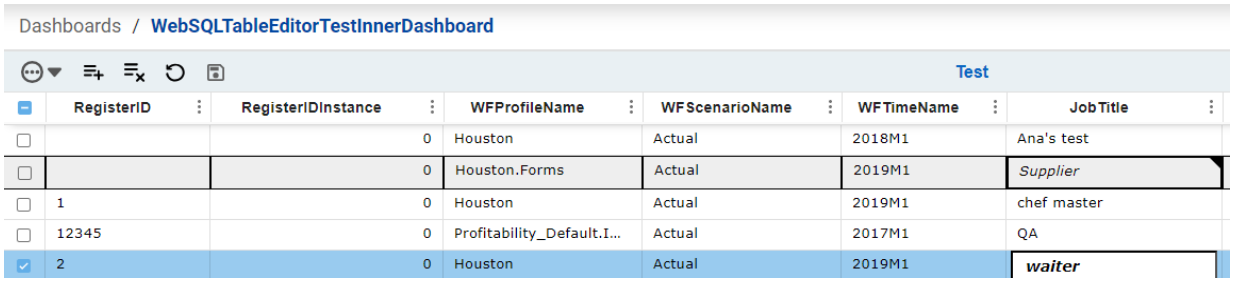
Grid options are now listed in a context menu.



SQL Table Editor

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





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

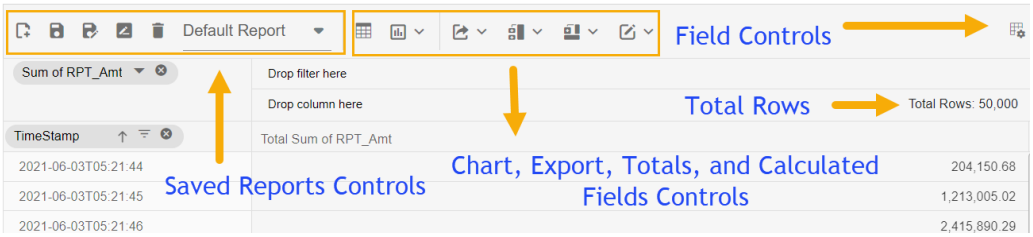
Pivot Grids in Browser UX come with a host of new features including Saved Reports, Charts, Calculated Fields, and Keyboard Navigation. Both Pivot Grid and Large Data Pivot Grid benefit from updated data processing that ensures all data is available for aggregation.

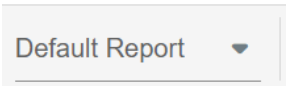
Notable Differences in Pivot Grids

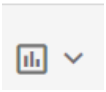
Field Controls are displayed in a floating dialog and launch using the *Show Fieldlist* button in the upper right corner of the pivot grid.

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.



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

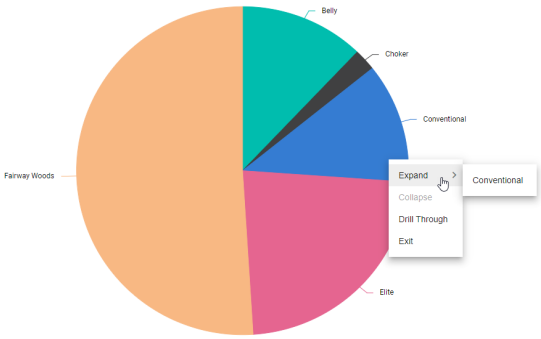
	Show table
	Chart types
	Export
	Subtotals
	Grand totals
	Formatting

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.

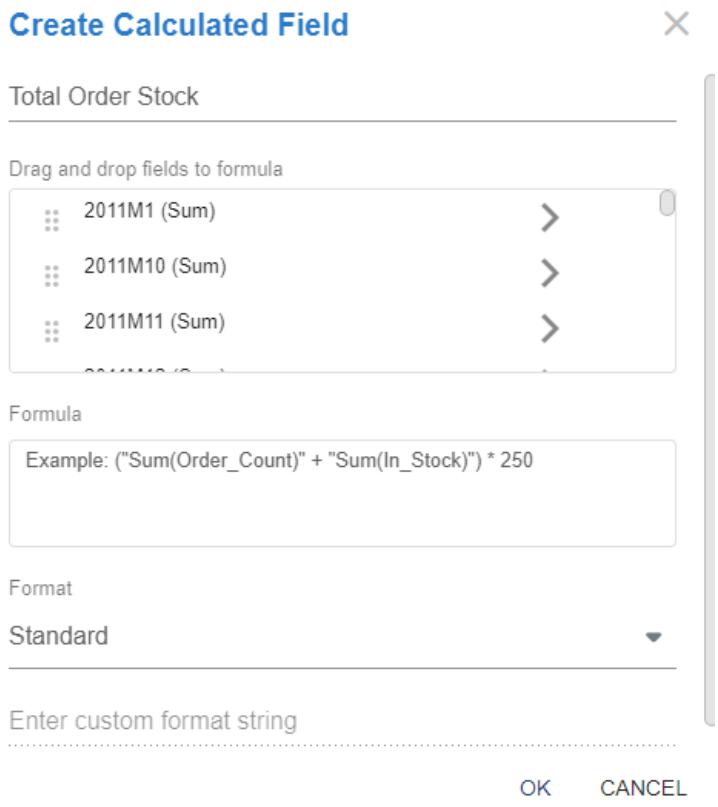
Charts – This new feature lets users easily visualize the data from a customized pivot grid into a chart. Simply select the Chart icon in the toolbar, then configure the available options. Charts can be saved as reports for future reference using the Saved Reports feature. See Appendix B for a full list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

- 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

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

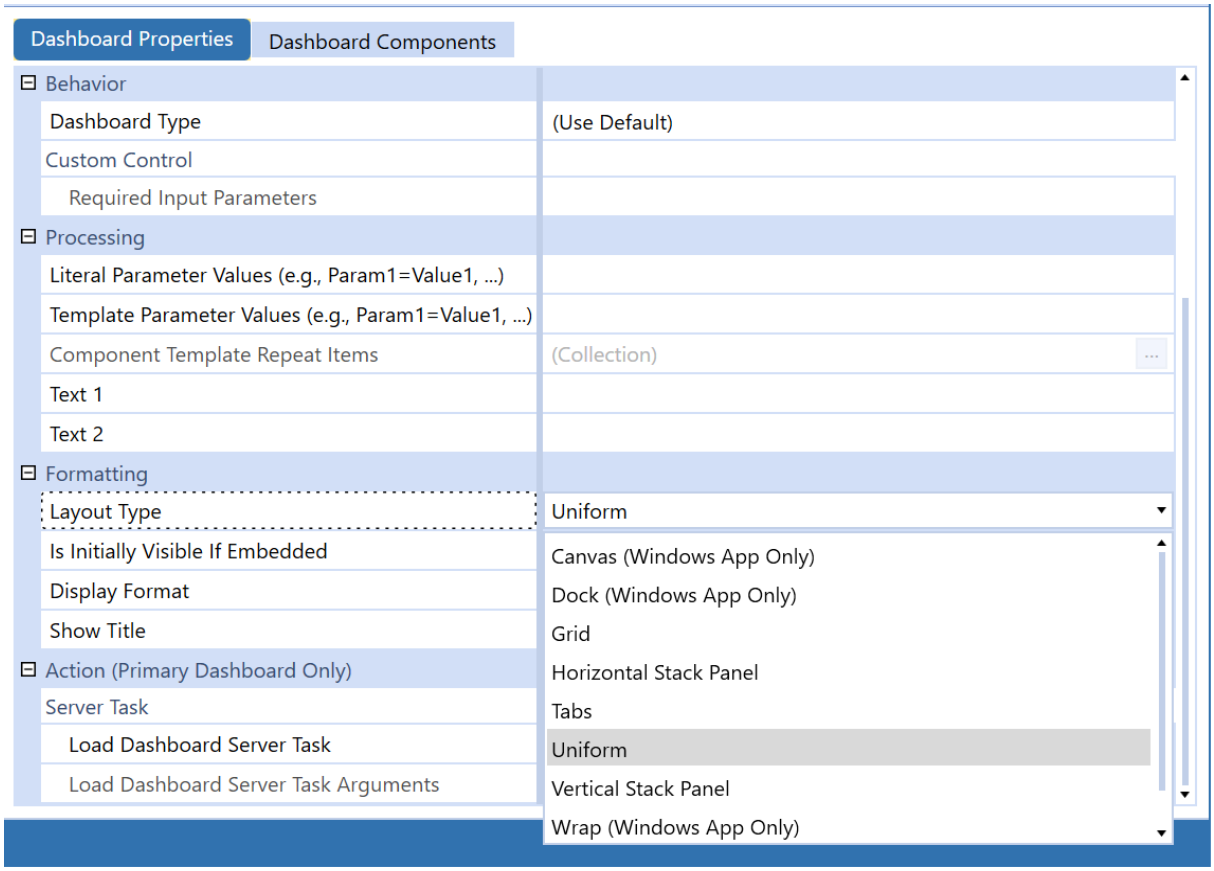
Dashboard Components

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

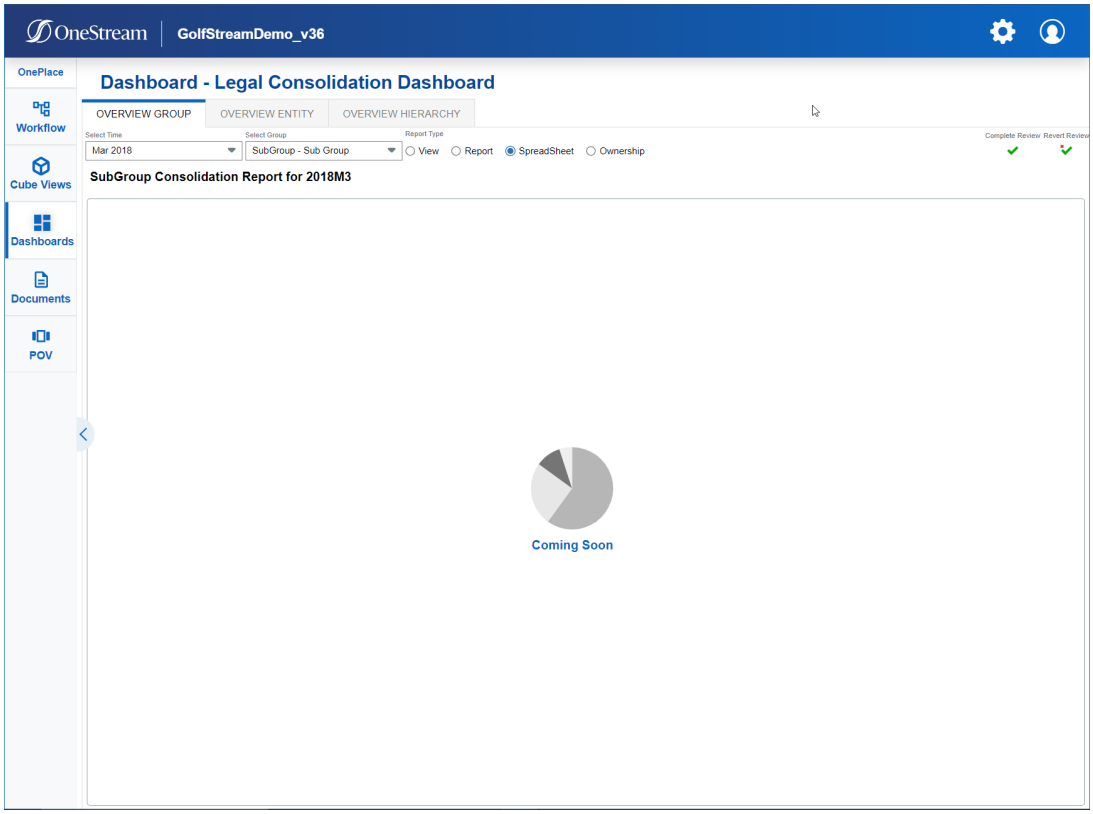
Navigating Dashboard Gaps

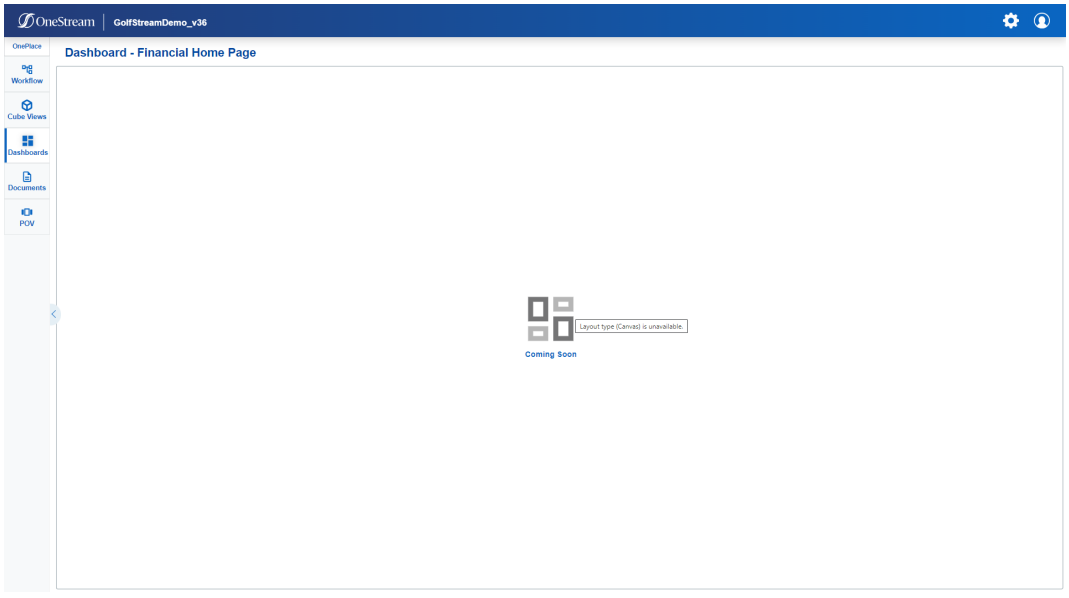
Helpful tips have been added to both the Windows Client and BrowserUX to assist dashboard designers and end users in identifying dashboard layouts and components that are not yet supported in BrowserUX.

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



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.


OneStream
GolfStreamDemo_v36
OnePlace
Workflow
Cube Views
Dashboards
Documents
POV
Dashboard - Legal Consolidation Dashboard
OVERVIEW GROUP
OVERVIEW ENTITY
OVERVIEW HIERARCHY
Select Time
Mar 2018
Select Group
SubGroup - Sub Group
Report Type
View
Report
SpreadSheet
Ownership
Complete Review
Revert Review
SubGroup Consolidation Report for 2018M3
Coming Soon


OneStream
GolfStreamDemo_v36
OnePlace
Workflow
Cube Views
Dashboards
Documents
POV
Dashboard - Financial Home Page
Layout type (Canvas) is unavailable.
Coming Soon

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

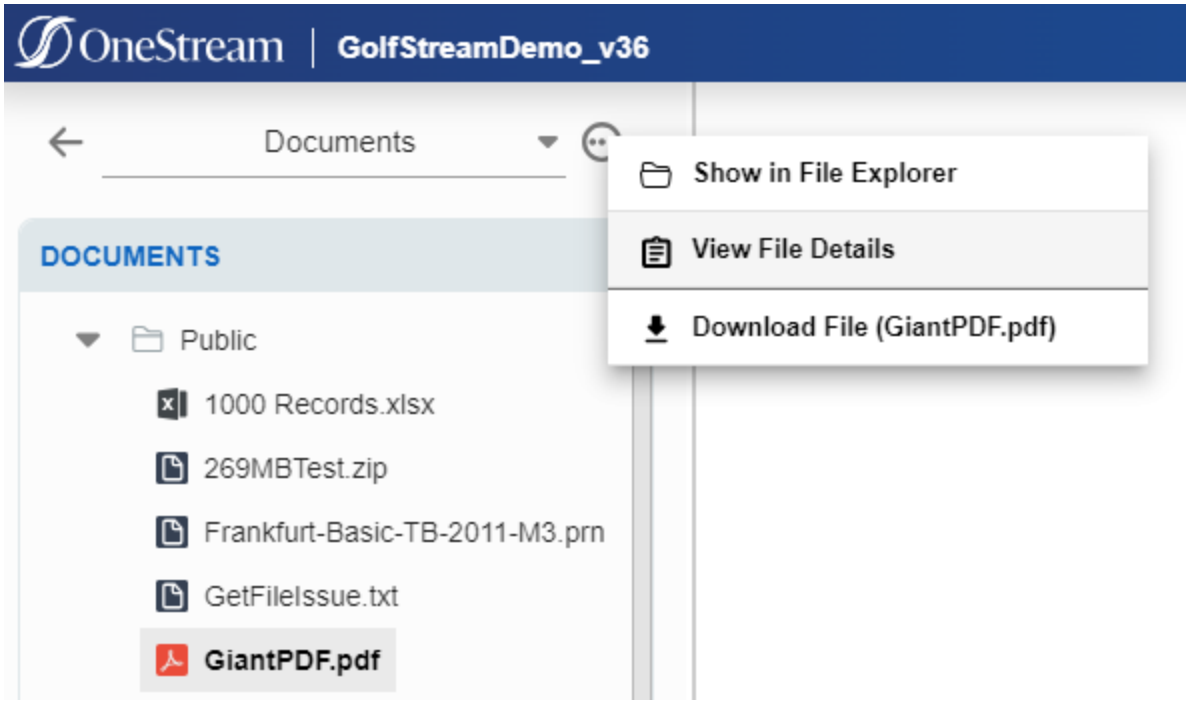
This approach uses a single adaptive dashboard. Designers need an initial understanding of how their dashboard should adapt to each client or device type intended for use. The designer creates Embedded Dashboards with configurations that link to client/device specific dashboards. The Embedded Dashboards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

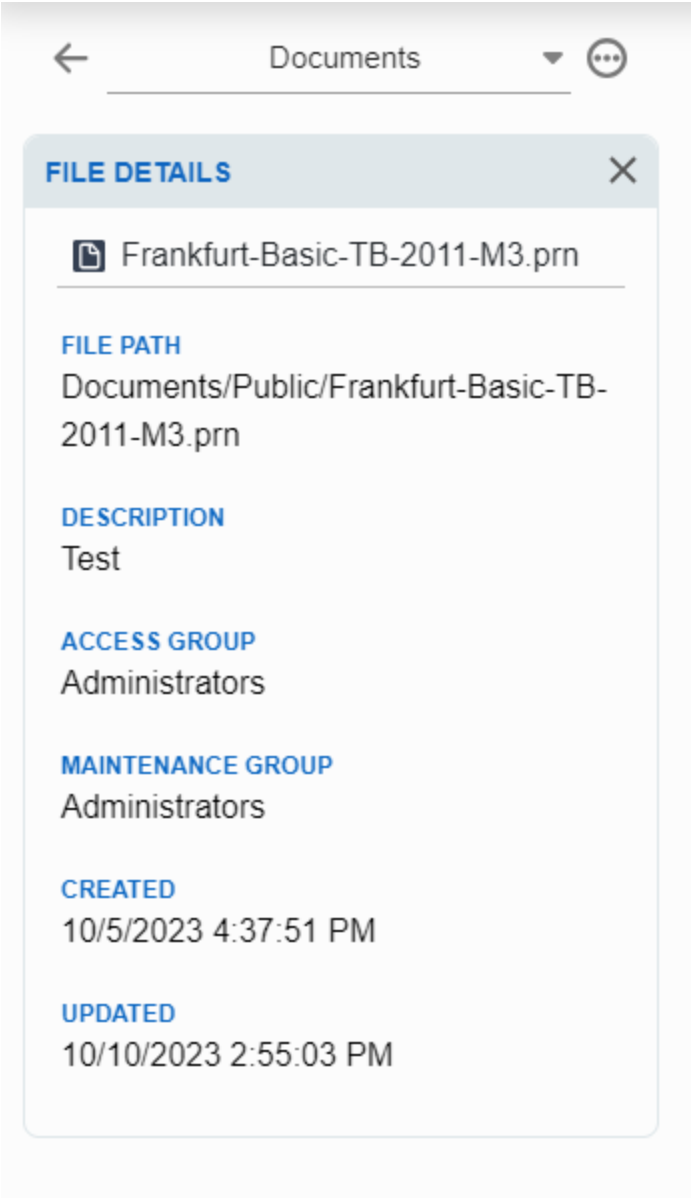
Documents

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
FILE DETAILS
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

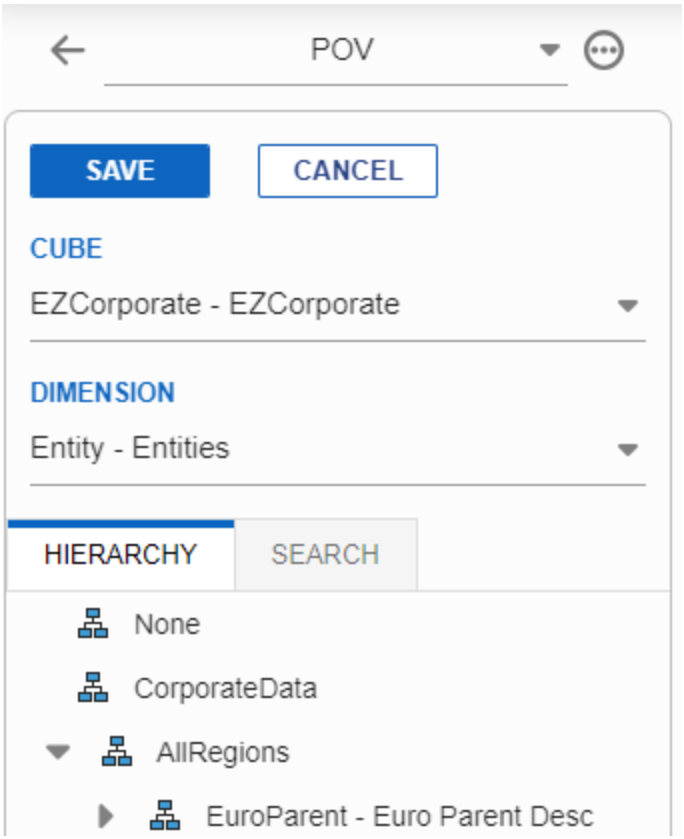
In BrowserUX, POV is in the OnePlace panel. To view and modify the current Cube POV, select the POV menu from the OnePlace panel. Similar to Workflow POV, the Cube POV Edit menu is displayed as an overlay menu, instead of a pop-up dialog. It's also important to note that information from the Windows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

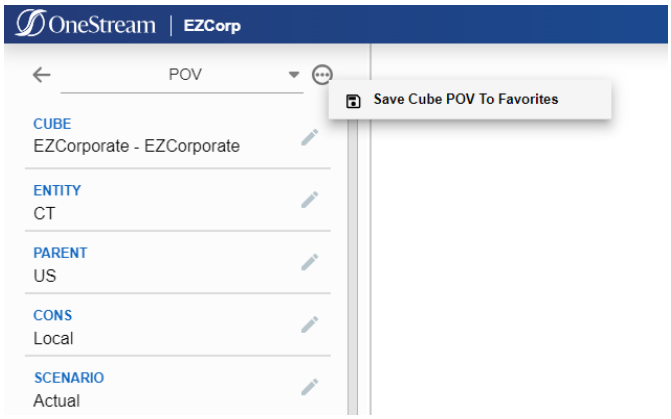
Modify a POV

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



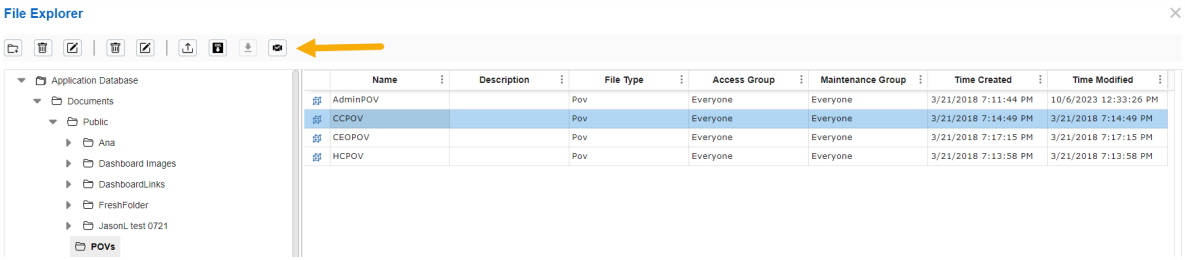
Save a POV

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
^	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

?	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.

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.

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.
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.

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.

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.

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.

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.
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.

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

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

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