

Build OneStream Self-Serve Reports with Embedded Dashboards. Fewer Reports / More Reporting

Embedded dashboards are used extensively in the Marketplace applications. They also can be used to customize Consolidation Cube Views. Deploy a single user interface to provide better insight and reduce report clutter.

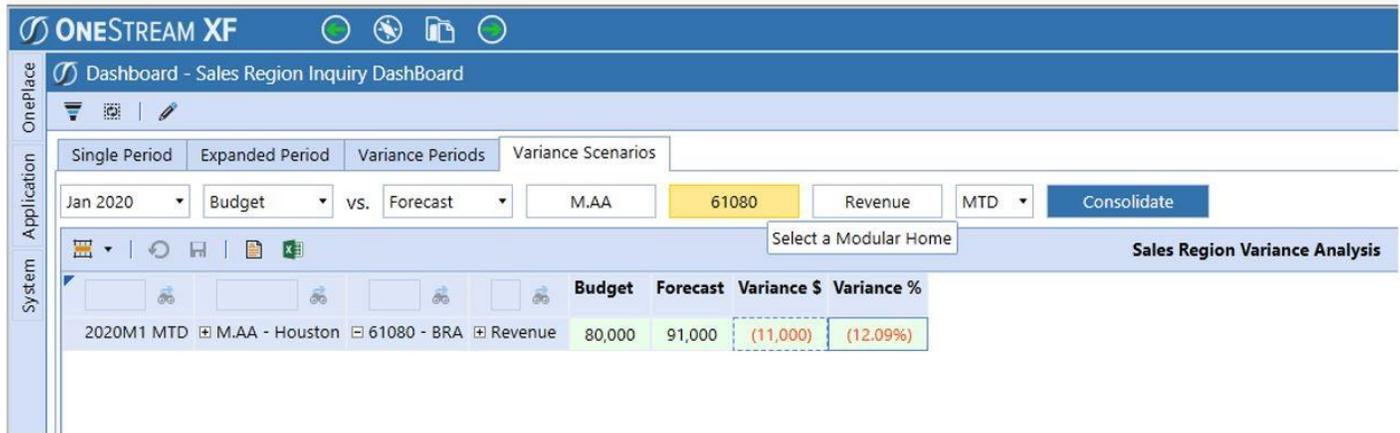
Illustration I – Interactive, Multi-Dimensional Discovery Analysis

The screenshot shows the OneStream XF interface with a dashboard titled "Dashboard - Sales Region Inquiry Dashboard". The interface includes several tabs: "Single Period", "Expanded Period", "Variance Periods", and "Variance Scenarios". The "Single Period" tab is active, showing "Jan 2020" selected. The "Variance Scenarios" section shows "Budget" vs. "Forecast" for "Sales Region". A "Consolidate" button is visible. The main data table is titled "Sales Region Variance Analysis" and displays the following data:

				Budget	Forecast	Variance \$	Variance %
2020M1 MTD	☑ Sales Region	☑ Modular Homes	☑ Net Income	2,740,886	2,916,546	(175,660)	(6.02%)
	☑ E - North Central	☑ Modular Homes	☑ Net Income	501,368	545,892	(44,524)	(8.16%)
	☑ M - South Central	☑ Modular Homes	☑ Net Income	1,376,391	1,715,798	(339,408)	(19.78%)
	☑ M.AA - Houston	☑ Modular Homes	☑ Net Income	135,000	111,000	24,000	21.62%
		61080 - BRA	☑ Net Income	35,000	61,000	(26,000)	(42.62%)
			☑ Revenue	80,000	91,000	(11,000)	(12.09%)
			☑ Direct Cost	45,000	30,000	(15,000)	(50.00%)
		61500 - KIL	☑ Net Income	20,000	20,000	0	0.00%
		67100 - SAN	☑ Net Income	30,000	15,000	15,000	100.00%
		96000 - GEL	☑ Net Income	50,000	65,000	(15,000)	(23.08%)
		1000004 - DPM	☑ Net Income		(50,000)	50,000	100.00%
	☑ M.DM - New Orleans	☑ Modular Homes	☑ Net Income	1,216,561	1,570,940	(354,379)	(22.56%)
	☑ M.IO - Mobile	☑ Modular Homes	☑ Net Income	24,829	33,858	(9,029)	(26.67%)
	☑ I - North East	☑ Modular Homes	☑ Net Income	470,000	330,000	140,000	42.42%
	☑ S - North West	☑ Modular Homes	☑ Net Income	393,128	324,856	68,272	21.02%

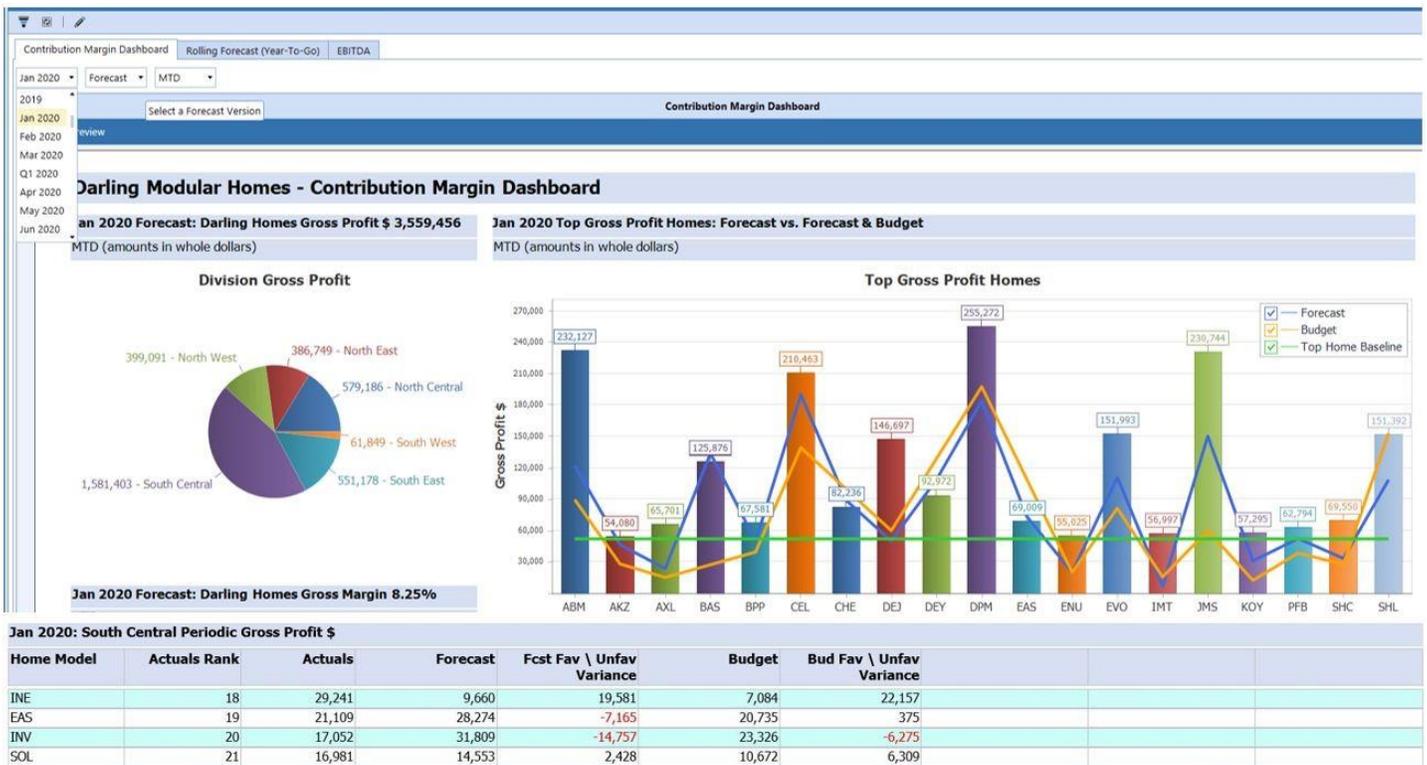
- Four dashboard tabs conveniently deliver the same content that typically requires many cube views.
 1. Single Period balance analysis
 2. All Periods Rolling up to Selected Period. E.g. Year
 3. Period vs. Period with Better / Worse Variance \$ & %
 4. As Illustrated above, Scenario vs. Scenario with Better / Worse Variance \$ & %
 - a. Actuals vs. Budget
 - b. Budget vs. ForecastV1
- The Dashboard tabs are designed for Interactive Analysis.
 - Drop-Down Data Filters
 - Expand / Collapse Row Navigation

Illustration II – Dynamic Variance Report



- In addition to the drop-down filters, we have Tree View dialogue boxes to select Division & Account.
- In our example we have selected Modular Home (Division) 61080 and Account Revenue.
- The report rows are updated to display Modular Home 61080 and Account Revenue.

Illustration III – Dynamic OneStream BI Report Package



- Embedded Dashboards can also be used to deploy OneStream Studio BI reports.
- In our example we have used Cube Views to build an 11 page BI report package.
- Similar to the previous illustrations, drop-down data filters update the report.