onestream

Modern Browser Experience Guide

9.2.0 Release

Copyright © 2025 OneStream Software LLC. All rights reserved.

All trademarks, logos, and brand names used on this website are the property of their respective owners. This document and its contents are the exclusive property of OneStream Software LLC and are protected under international intellectual property laws. Any reproduction, modification, distribution or public display of this documentation, in whole or part, without written prior consent from OneStream Software LLC is strictly prohibited.

Table of Contents

About This Guide 1

Modern Browser Experience Overview 2

New Features and Functionality in Modern Browser Experience Version 9.2.0 3

- Functional Capabilities 3
- Cube Views 4

Access the Modern Browser Experience 5

- Authentication 5

Functional Capabilities 6

- Intuitive User Experience 6
  - Log In 6
  - Log Out 7
  - Change Applications 8
- Header 8

OnePlace Panel 10
File Explorer 11
Grids 12
Anchored Dialogs 13
Timeout 14
Smart Links 15
Accessibility 16
Workflow 17
Navigation 17
Workflow Breadcrumbs 20
Supported Workflow Functionality 21
Workflow Steps 21
General Workflow Functionality 21
Notable Differences from Windows Application 22
Notable Workflow Functionality Gaps 24
Workflow Steps 24

General Workflow Functionality 24
Navigating Workflow Step Gaps 25
Cube Views 26
Supported Cube View Functionality 26
Presentation 26
Toolbar Functions 27
Cube View and Cell-Level Context Menu Functions 27
Cube View Navigation 28
Cube View Drill Down 28
Cube View Designer 29
User Experience Differentiators 32
Unsupported Cube View Functionality 33
Accessibility 34
Dashboards 36
Enabling Dashboard Access 36
Notable Differences from Windows Application 38

Dashboard Components 38

BI Viewer 38

BI Viewer Designer 39

Embedded Dashboards 40

Text Box 43

Grid View 43

SQL Table Editor 43

Grid Keyboard Functionality 44

Large Data Pivot Grid & Pivot Grid 44

Advanced Charts 46

Text Editor 47

Filter Editor 47

Maps 47

Menu 47

Spreadsheet 48

Web Content 48

Notable Dashboard Functionality Gaps 49
Dashboard Layouts 49
Dashboard Components 49
Navigating Dashboard Gaps 49
Dashboard Design Process 52
Dashboard Accessibility Design Approaches 52
Multi-client/Device Dashboard Design Approaches 54
Approach 1: Unified Multi-client/Device Dashboards 54
Approach 2: Client/Device Specific Dashboards 55
Approach 3: Client/Device Adaptive Dashboards 55
Documents 56
POV 59
Additional Features 59
Modify a POV 59
Save a POV 60
Apply a Saved POV 61

Appendix A: Advanced Charts 62

Configuration Properties 63

Appendix B: Spreadsheet Features and Functionality 64

Supported Spreadsheet Features and Functionality 64

Unsupported Spreadsheet Features and Functionality 66

Appendix C: Supported Number Formats 68

Appendix D: Smart Link APIs 69

Create Smart Link 69

Retrieve Smart Link 71

Delete Smart Link 72

Modify Smart Link 73

Appendix E: Component Keyboard Controls 75

About This Guide

This guide introduces the Modern Browser Experience and highlights the end user benefits and functional differences of using OneStream's web-accessible interface. This guide is intended to:

- Familiarize OneStream end users, power users, administrators, partners, and consultants with the supported functionality, features, and interfaces in the Modern Browser Experience.
- Provide the prerequisites and directions for implementing the Modern Browser Experience in a customer environment.
- Provide high-level information describing features, capabilities, general usage patterns, end-user flows, and best practices unique to the Modern Browser Experience.
- Explain the functional, technical, and visual differences between the Modern Browser Experience and the Windows application.

Modern Browser Experience Overview

Welcome to the Modern Browser Experience, OneStream's latest, web-based offering that is Generally Available on OneStream Platform Version 8.4.0 or later. The Modern Browser Experience works alongside the existing OneStreamWindows application, giving users more flexibility by providing them with a way to access their data from a web browser on a wide range of devices. OneStreamin 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 OneStream Solutions should render in the Modern Browser Experience. To find out which solutions are officially supported, 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 in the Installation guide.

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.

New Features and Functionality in Modern Browser Experience Version 9.2.0

Modern Browser Experience Version 9.2.0 introduces new features across the platform and includes a variety of bug fixes, performance improvements, and security and privacy enhancements.

Functional Capabilities

Feature	Description
Accessibility	Implemented significant enhancements to support screen reader software and related keyboard controls. Added an Accessibility toggle that applies ADA-compliant colors and patterns to certain Cube View cells, enhancing visibility for users with limited color perception while preserving the default experience for others. See Appendix E for a comprehensive list of supported keyboard controls. See Dashboard Accessibility Design Approaches for more information on accessible dashboard design strategies.
Dynamic Grids	Dynamic Grids have been implemented, providing designers with a fully customizable, exceptionally performant grid component for dashboards.

Cube Views

Feature	Description
Cube View Designer	The Cube View Designer has been updated with an improved look and feel, enabling more intuitive interaction with on-screen elements and fields. Users can now save a new cube view directly from the Cube View Designer. This enhancement allows users to save a modified design as a new, separate cube view. See Cube View Designer for more information.

Access the Modern Browser Experience

The browser URL structure uses a company subdomain (for example, https://cloudsitename.onestreamcloud.com). OneStream recommends using Chrome, Edge, or Safari to access the Modern Browser Experience.

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.

Setup and configuration of the Modern 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.

Functional Capabilities

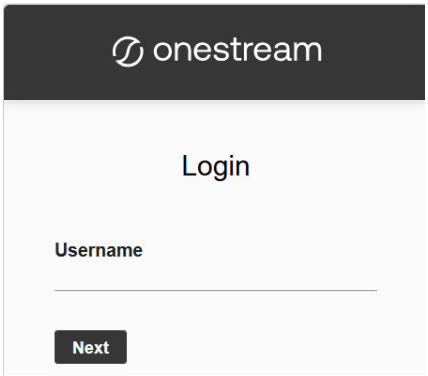
This section explores foundational capabilities and general features of the Modern Browser Experience, and highlights the notable differences between the browser and Windows application.

Intuitive User Experience

Log In

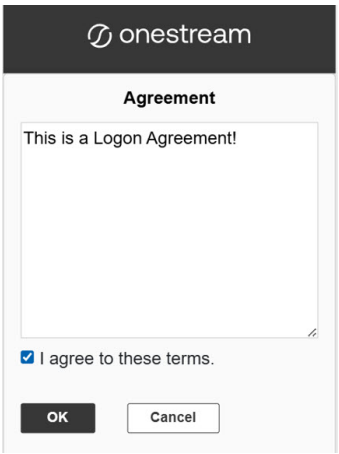
The Modern Browser Experience is accessed through a web browser instead of using a Windows shortcut or ClickOnce to open a local instance of OneStream. You can use bookmarked URLs to navigate to the browser. Once successfully authenticated, you can select an application from the drop-down menu and click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

The browser environment can be accessed using a custom URL. For example, https://cloudsitename.onestreamcloud.com. Once the initial login screen has loaded, users can enter a username and click the Next button to authenticate through their Single Sign-On (SSO) provider.

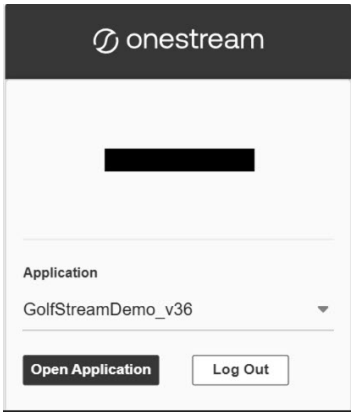


Following successful authentication, the user will either be:

- Redirected to the Login Agreement page (if applicable).



- Redirected to an application (if only one application is accessible).
- Redirected to the Application Selection page (if more than one application is accessible).



Log Out

Users can log out from the Application Selection page or by selecting Log Out from the User Menu.

Logging out of the Modern Browser Experience will not log out users from their other open instances of OneStream, such as the Windows application or Excel Add-In, nor will it log out users from their SSO sessions.

Change Applications

Select **Change Application** from the **User Menu** to display the Application Selection page and change the current application.

Header

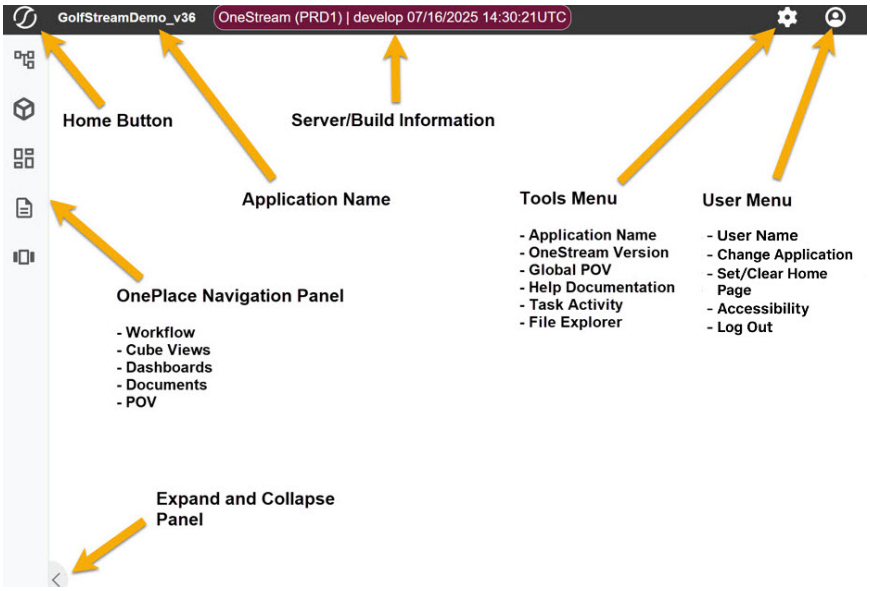
The Modern Browser Experience provides a familiar header area and updated OnePlace panel which can be accessed at any time while using the browser application. Similar to the Windows application, the header has a Home button embedded in the OneStream logo and displays the Application Name. Other header 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, Accessibility, 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.

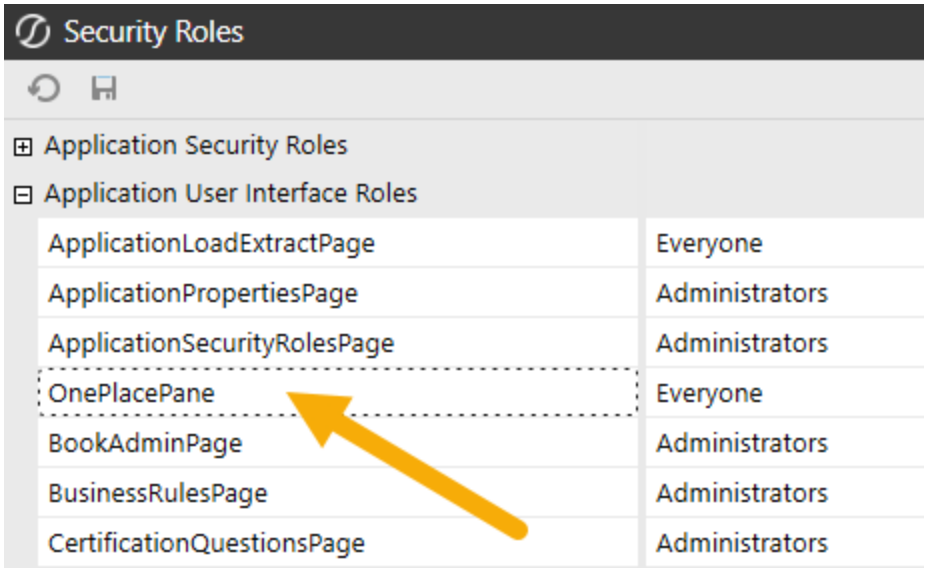
> **NOTE:** The OnePlace panel may be fully hidden for certain users using security settings.



OnePlace Panel

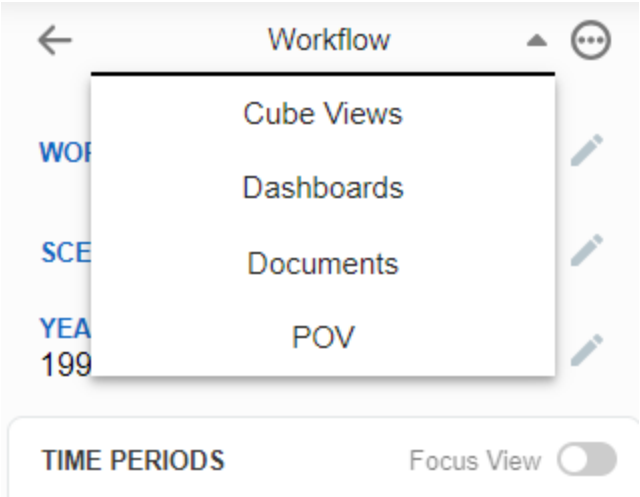
Hide OnePlace Panel

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. Note that the Modern Browser Experience does not provide a user interface to facilitate configuring and applying security roles at this time.



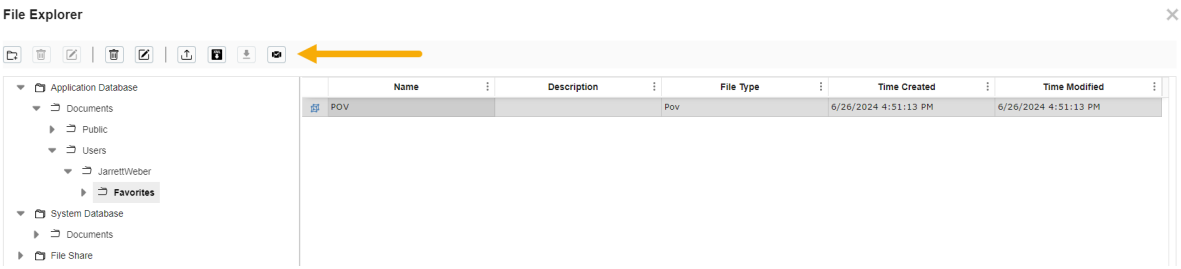
Navigate OnePlace Panel

Users can click a tile on the OnePlace toolbar to expand the flyout panel and access related end user options and features. The drop-down menu at the top of each panel can be used to easily navigate through all of the OnePlace panels.



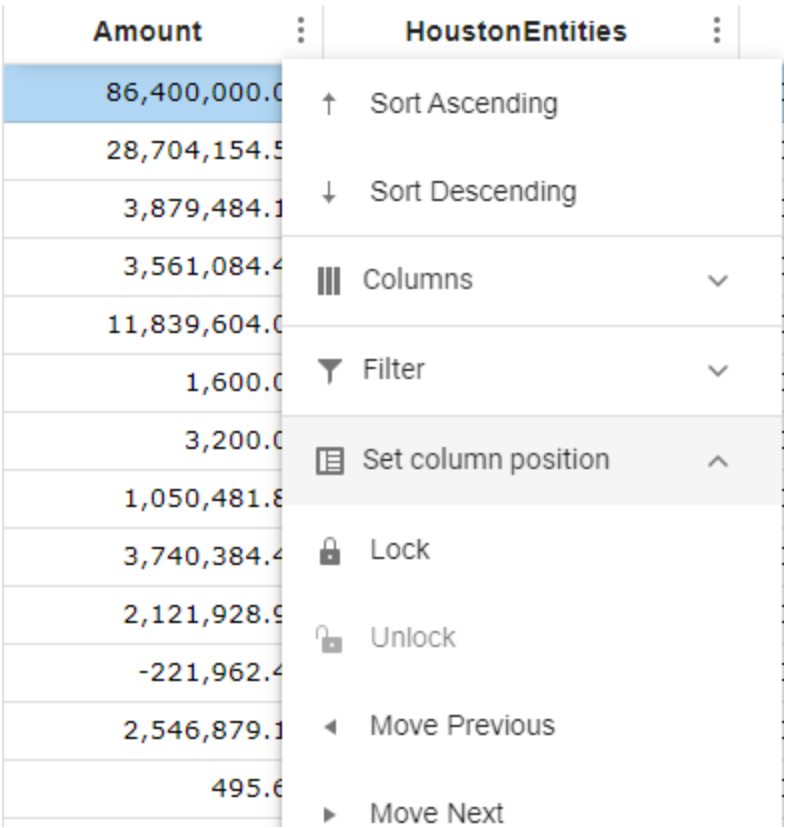
File Explorer

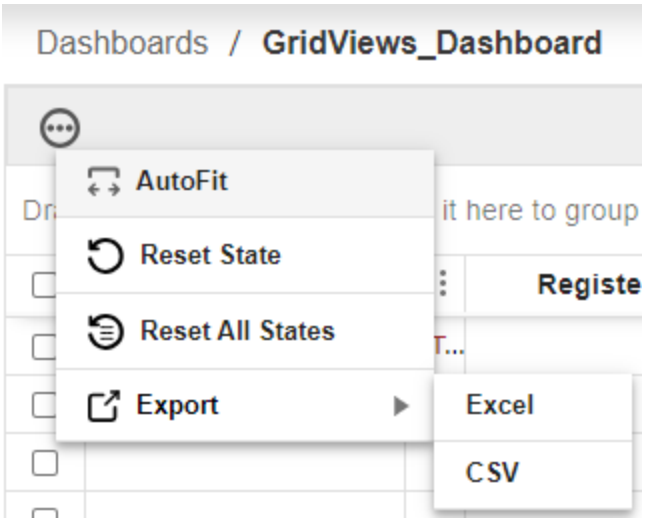
File Explorer is used to manage all OneStream files and saved POVs. The File Explorer dialog can be opened by selecting the File Explorer option from the Tools menu in the application header. File Explorer functionality is fully supported in the Modern Browser Experience and primarily located on the dialog toolbar.



Grids

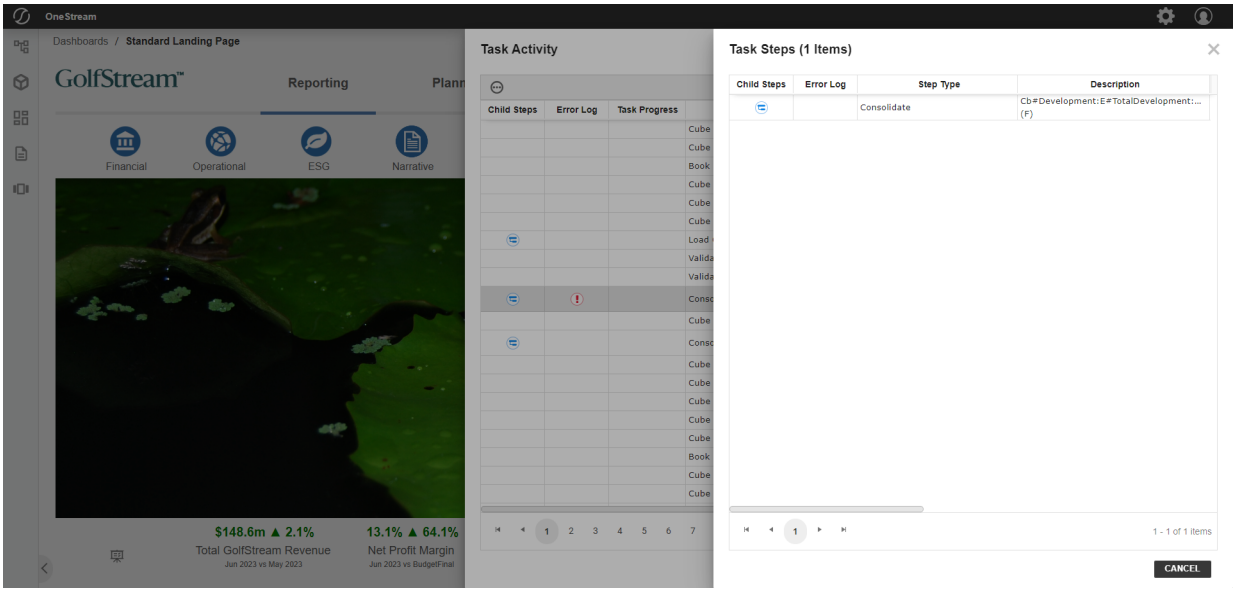
While the browser grids offer the same functionality as the Windows application, some differences were added to improve the user experience. Many of the grids have virtual scrolling instead of paging to handle large datasets. In addition to the Sorting, Filtering, and Column controls found in the Windows application, 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. Many of the grids will also have a context menu button in the left corner of the grid header with additional functionality. See Appendix C for a list of supported Number Formats.





Anchored Dialogs

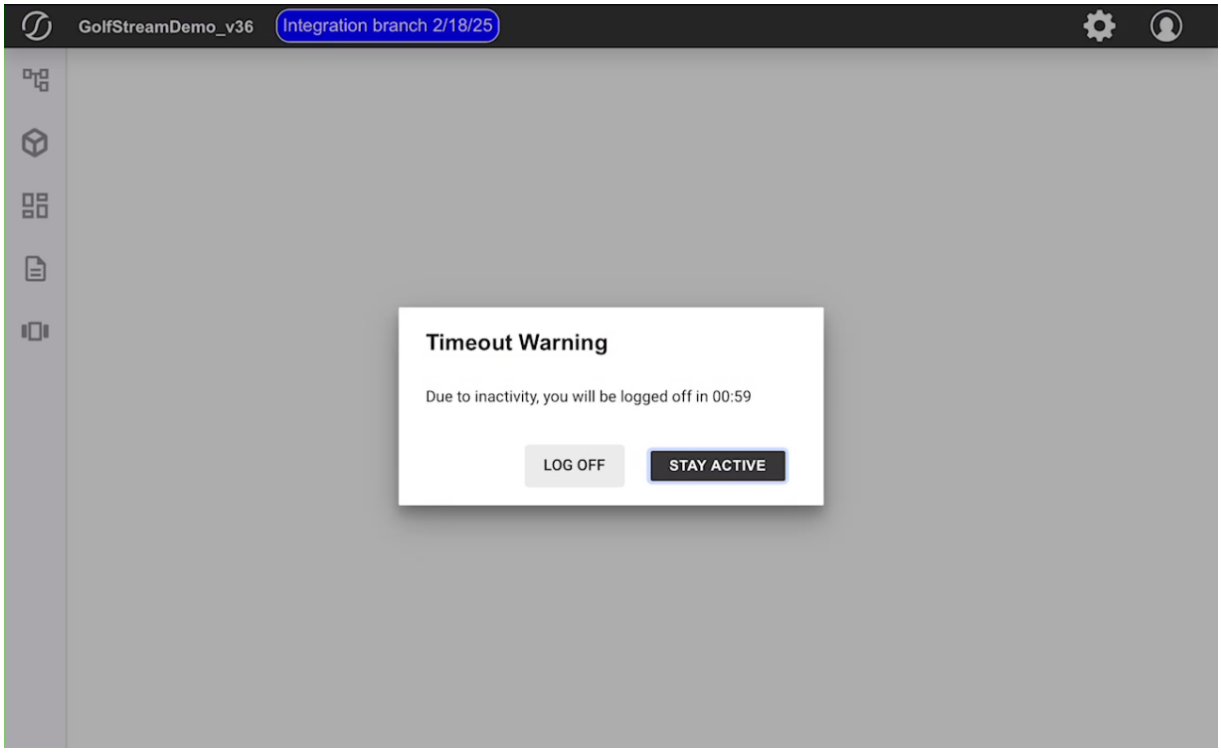
Many of the dialog boxes display in a slide-out panel anchored to the right side of the page instead of the floating dialogs used in the Windows application. This paradigm offers improved visibility and provides consistency for users accessing the browser from various devices. Slide-out panels can be 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 application, 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.

Timeout

A warning for users who are about to be logged off due to inactivity will now be displayed in a floating dialog two minutes prior to timeout, providing users with the ability to extend their session or log off. The length of idle time allowed for a user can be configured, but the two-minute warning threshold is not currently adjustable.



Smart Links

Smart Links are designed to make it easy to share dashboards. Built with a combination of security-aware features and declarative parameters, these links can open dashboards to specific pages or mimic a series of clicks.

Smart Links are generated and stored for a set period using a Business Rule. To access a shared link, users will simply click a hyperlink or paste the URL into a browser. On access, the Smart Link will:

- Verify if the user is logged in (if not, remain active through the login process)
- Check if the user has access to the shared dashboard
- Verify the dashboard can be rendered on the user's device

- Supply the dashboard with any declared parameters
- Prompt the user for any undeclared parameters
- Render the dashboard

Example Smart Link URL: https://example.onestream.com/share/E1C52337EEE9430EAAF52D6A5846109B/DashboardProfile/Dashboard

To get started, review the code snippets in Appendix D.

Accessibility

Interfaces, features, and functionality provided in the Modern Browser Experience have been enhanced to thoroughly and effectively support the industry-standard Web Content Accessibility Guidelines (WCAG) established by the World Wide Web Consortium (W3C).

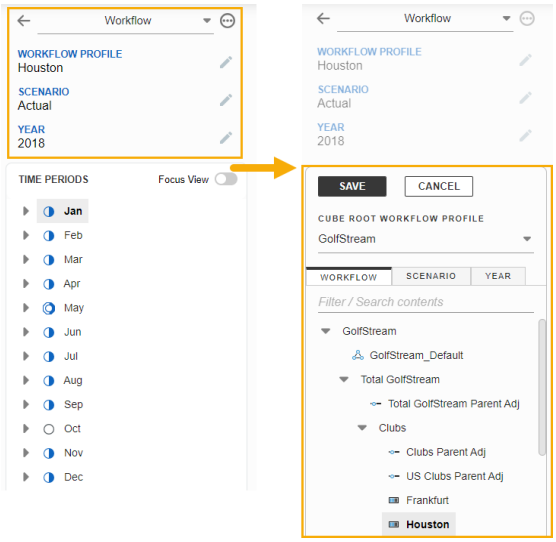
Workflow

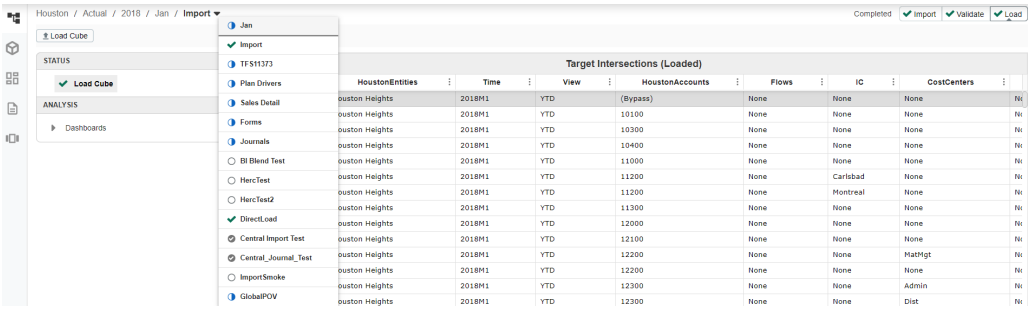
Workflow on the browser delivers the same functionality offered in the Windows Application with a few notable exceptions mentioned below. Some tactical user experience improvements have been made, while primarily focusing on delivering the functionality of the workflow steps.

Navigation

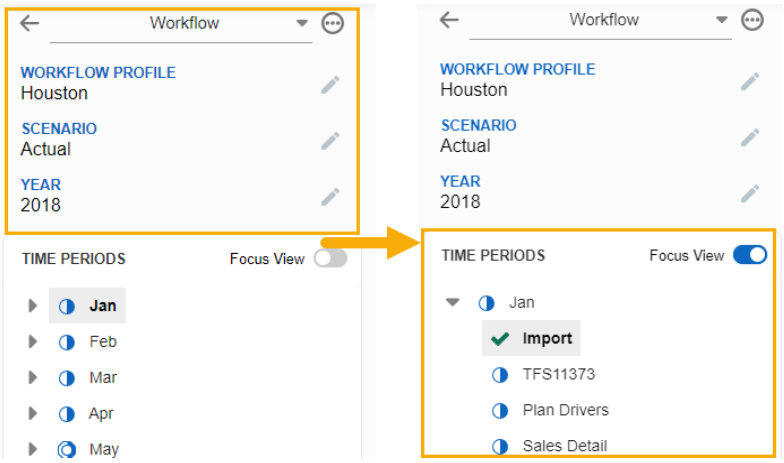
Similar to the Windows Application, Workflows are accessed through the OnePlace panel. Users are able to modify the Workflow POV by selecting the edit icon next to each dimension and navigate between Workflow Units under Time Periods. It is important to note a few differences between the browser and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





- 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.

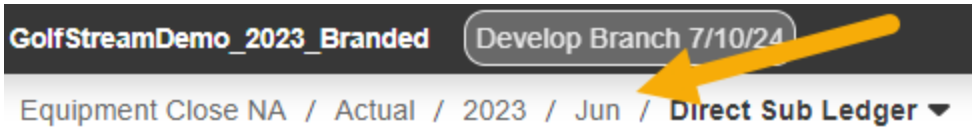


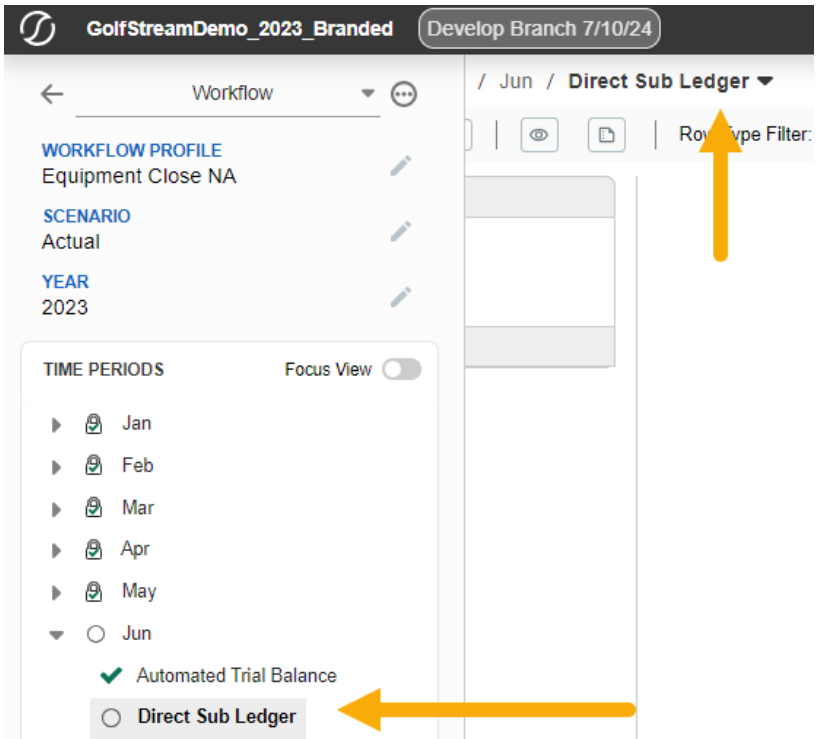
Status Icons have been updated, and in some cases, combined to make a more intuitive user experience.

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		

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 drop-down menu in the Workflow page title bar allows users to quickly toggle between Workflow Steps in a Time Period.





Supported Workflow Functionality

Workflow Steps

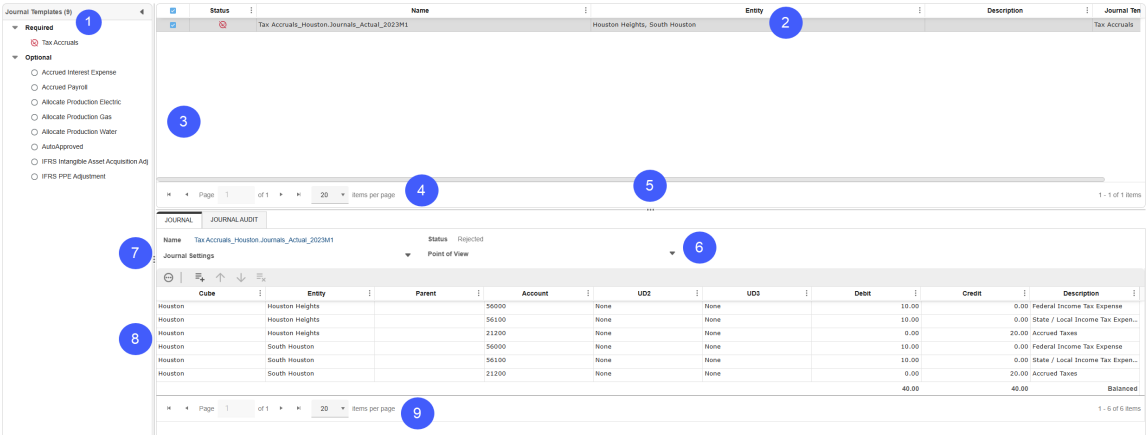
- Blend
- Certify
- Confirm
- Direct
- Form
- Import
- Journal Input
- Load
- Pre-Process
- Process
- Validate
- Workspace

General Workflow Functionality

- Drill Back
- Drill Down
- Analysis Area
- Application Configurations
- Intercompany Matching
- Multi-Period Processing
- Time Range Periods
- View Transformation Rules
- View Processing Log
- View Source Document
- Time Period Actions
- Dependent Actions

Notable Differences from Windows Application

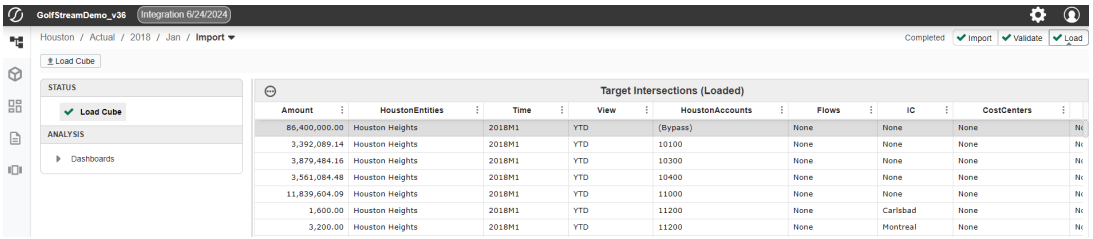
- Journals - The Journal Input page in the Modern Browser Experience utilizes an updated layout that is different from design used in the Windows application but intended to improve the user experience and increase productivity. Refer to the screenshot and list below to review specific, key differences between the two interfaces.



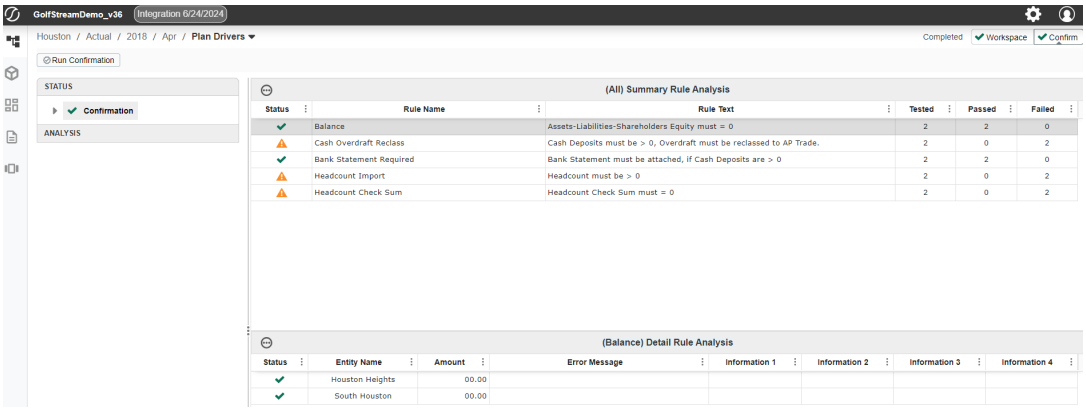
  - 1 - Journal Template appears in collapsible pane.
  - 2 - Entities appear in upper grid.
  - 3 - Journals' Grid now appears above the Journal details.
  - 4 - Paging on Journals' Grid.
  - 5 - Journal details appear below the Journals' Grid.
  - 6 - Journal header settings appear in collapsible drown-downs.
  - 7 - Journal Header.

- 8 - Journal Line Items.
- 9 - Paging on journal line items.

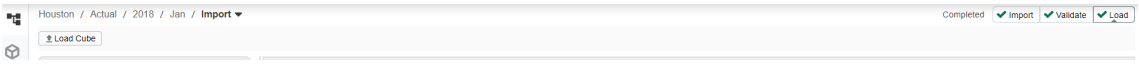
- Workflow Page Styling – Workflow Title, Workflow Steps, Grids, Status Area, and Analysis Area.



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

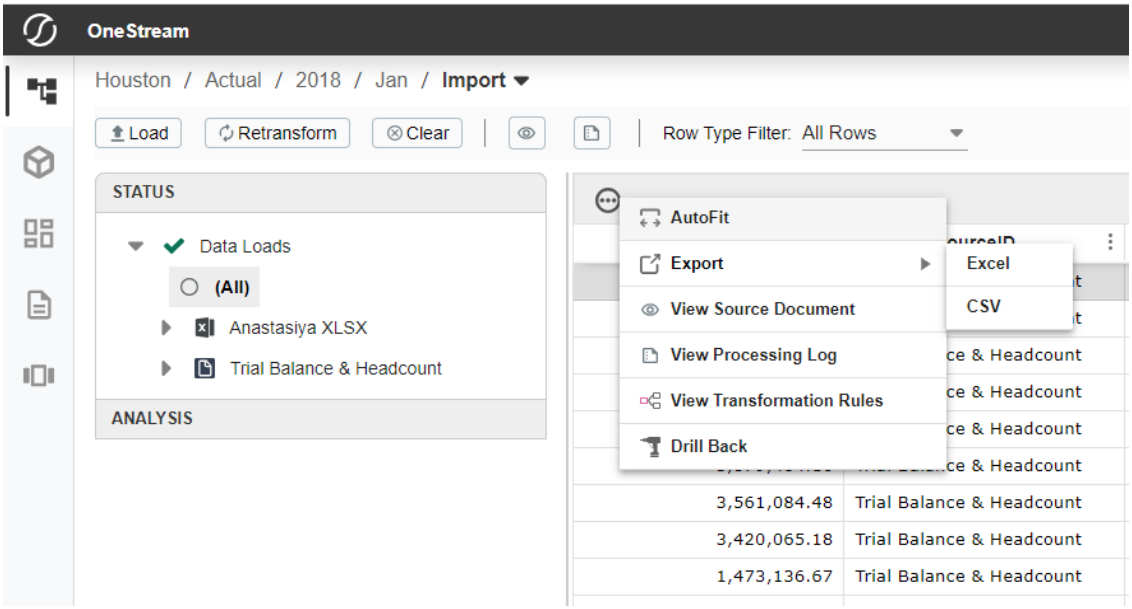


- Workflow Progress Buttons – Now displayed on the right side of the screen, the progress buttons have been updated with new icons and borders to improve visibility.



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

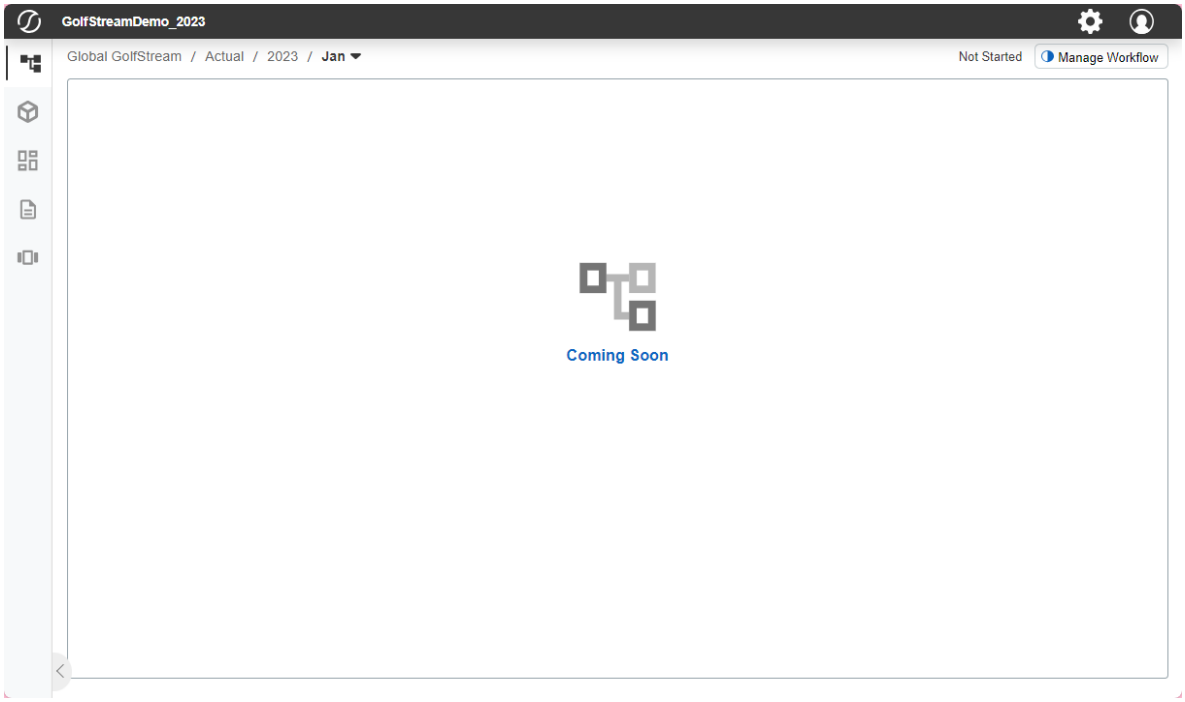
- Manage Workflow

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. *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

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.

For Cube View keyboard controls, see Appendix E: Component Keyboard Controls.

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 application (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.

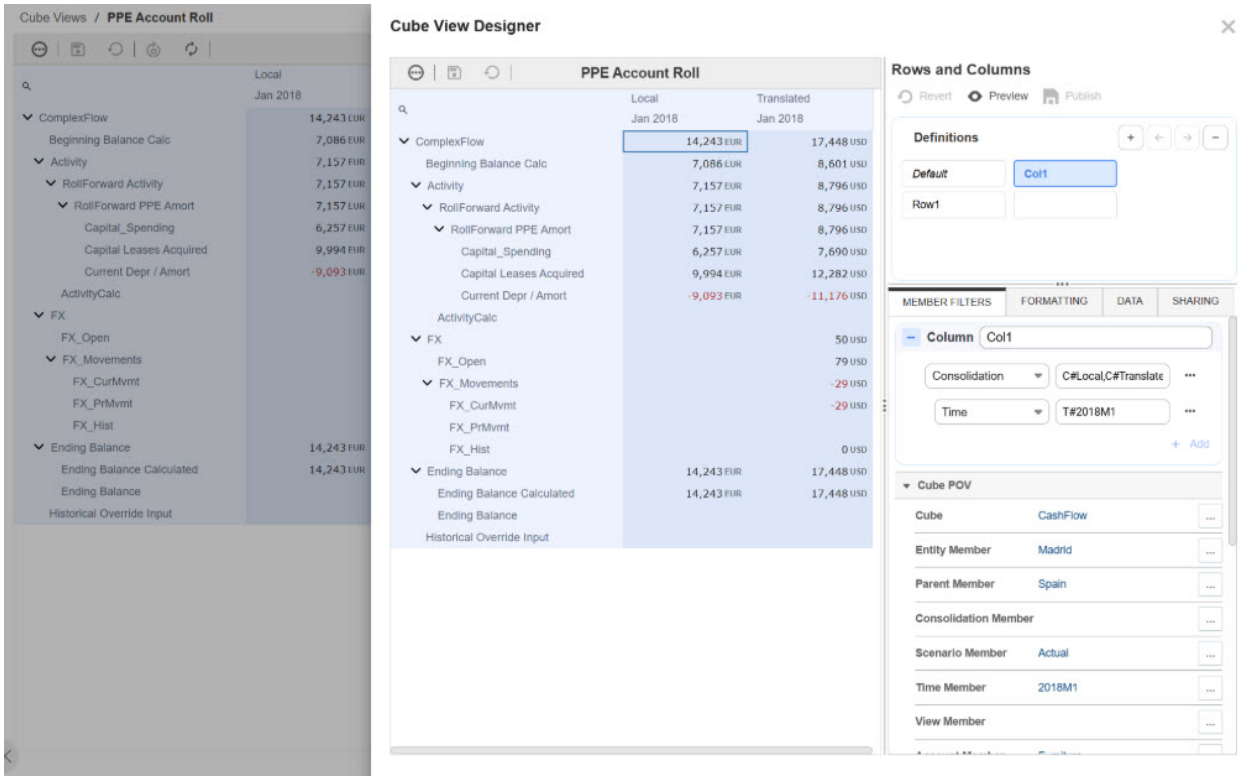
Cube View Designer

The Cube View Designer is a new feature in the Modern Browser Experience that is based closely on the design of the Cube View Designer in the Windows application. However, the Cube View Designer in the Modern Browser Experience is accessed from pre-existing cube views and provides users with the ability to see the underlying configurations that define the structure and presentation of the originating cube view. Users can edit those configurations and preview their changes directly from the designer, and administrators can save their design updates to the originating cube view.

Users with the appropriate privileges can open the Cube View Designer by selecting the option from the cube view toolbar and hidden context menu. When the Cube View Designer dialog is opened, a copy of the originating cube view is rendered in the dialog. Users can view and/or edit the row and column layout, expansion levels, member filters, display format definitions, data configuration settings, and general row and column templates. Please note the following differences between the Windows application and browser designer interfaces:

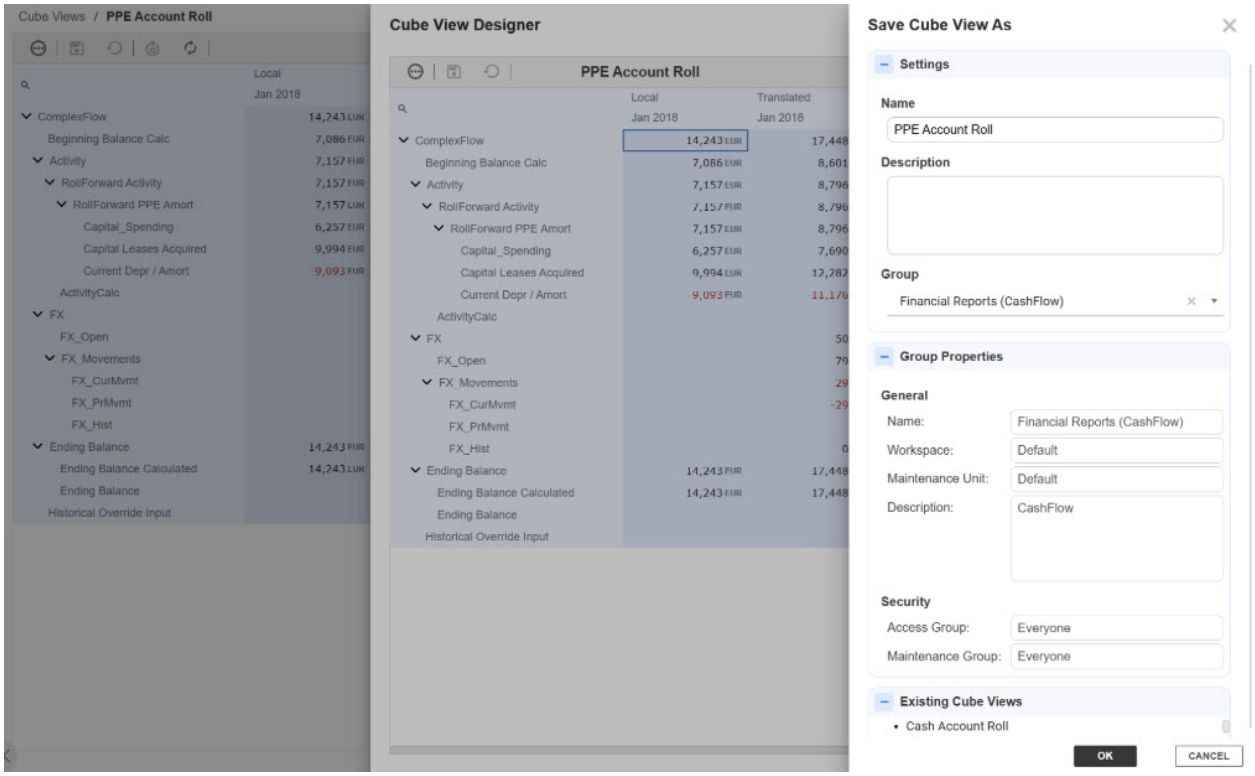
- Cube POV can be found under the Member Filters tab. The POV applies to the entire cube view.
- Cube View Row/Column Sharing settings can be found under the Sharing tab when the *Default* cell is selected in the layout grid. These sharing settings apply to the entire cube view. Users must enter cube view template names manually as the object look-up dialog has not yet been implemented in the designer. Specific row/column sharing settings are not currently available to edit or view in the designer.
- Display formatting settings must be entered manually in the designer as the formatting dialogs have not yet been implemented for this feature.
- Shortcut Cube View Names must be entered manually in the designer as the object lookup dialog has not yet been implemented for this feature.

Once changes have been made to any of the available configurations in the designer, the Preview button can be used to process those changes and render the new, temporary design of the cube view in the left panel of the dialog. The Preview function does not change the configuration of the originating cube view but instead provides users with a way to quickly see how their changes would impact the design and presentation of the cube view. After previewing changes, users can make further updates and preview the temporary cube view again or use the Revert button at any time to revert settings back to the last saved version of the original cube view.



Users with the appropriate security privileges can use the Publish feature to create or overwrite a cube view using the configuration settings defined in the designer. Clicking on the Publish button opens a menu with options to Save or Save As.

- Selecting Save will overwrite settings in the original cube view definition with the settings specified in the designer.
- Selecting Save As will open a dialog that provides users with the option to enter a name, description, and/or cube view group and save the modified configuration in the designer as a new cube view. Users can select a cube view group from the drop-down menu to review the group details and associated cube views in the two panels below Settings.



User Experience Differentiators

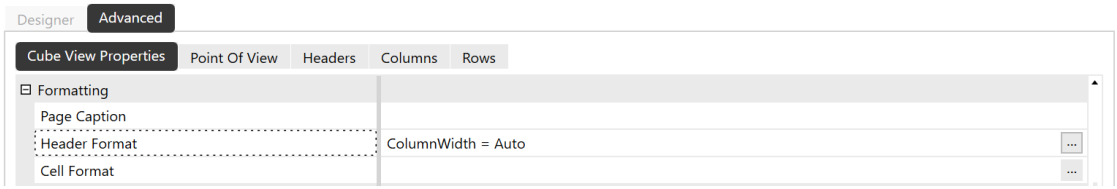
Row virtualization has been implemented to efficiently retrieve and render large datasets for Cube Views. Row virtualization retrieves data to display as the user scrolls vertically through Cube View pages, improving performance of client-side data rendering and enabling a more seamless data review process.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

Cube View Designer

- The Cube View Designer interface in the Modern Browser experience can only be accessed from an existing cube view (via the toolbar menu or hidden context menu) at this time.

Autofit

- The Modern Browser Experience provides users with two different ways to autofit column widths in cube views:
    - The default autofit method will determine the width of a given column based on the length of the column header text when there is no width specified for that column. The default minimum column width of 160px will be applied if the column header text is shorter in length.
    - The new autofit is enabled when the global column width for a cube view is set to "Auto." When this is specified, each column width is set to the length of the widest cell found within the top 30 rows of that column. If any column has a specific width defined, that width setting will be utilized instead of autofit. This must be set at the global level and will not work for specific columns with width set to "Auto." The default minimum column width of 160px will not be used when "Auto" is set globally for cube view columns.



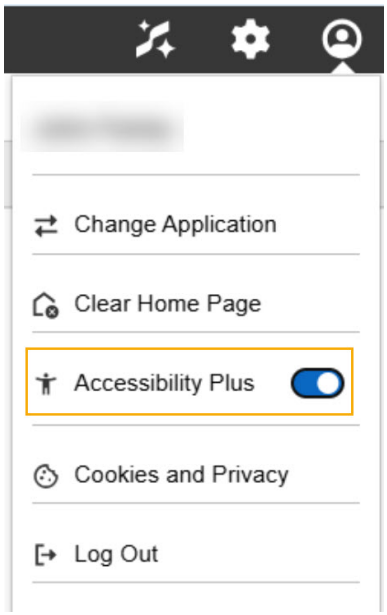
Unsupported Cube View Functionality

- Allocation
- Cube View Designer
    - General Settings
        - Header Text, Size, and Overrides
        - Report

        - Excel
        - Navigation Links
    - Report Header
    - Report Footer
    - Rows and Columns
        - Sharing
        - Row Overrides
        - Column Overrides
        - Conditional Formatting

Accessibility

To further improve Cube View readability for individuals who do not rely on screen readers or color cues, an optional toggle has been introduced that provides the ability to switch between default background colors or patterns to better distinguish valid, invalid, or unsaved cells. Note that custom cell background display formatting will take precedence over the default background colors and patterns. The Accessibility Plus toggle can be found in the User Menu and the default state is off.


Change Application
Clear Home Page
Accessibility Plus
Cookies and Privacy
Log Out

Dashboards

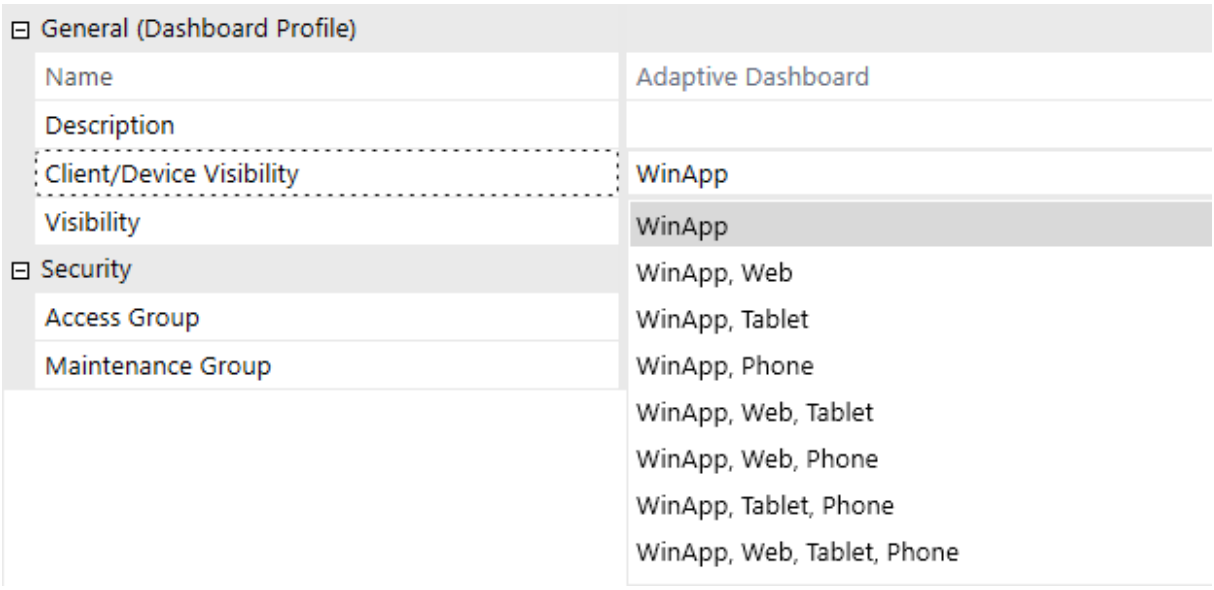
Functional coverage (with the goal of offering equivalent use of layouts and components available in the Windows application) continues to be expanded upon for dashboards in the Modern Browser Experience. Currently, the most commonly used features are available. For dashboards that contain elements that have not yet been delivered or expose issues that may arise through use of unique design techniques, there are typically design and configuration changes or workarounds that can be utilized to achieve the same goals until subsequent releases close those particular, functional gaps.

While browser capabilities move toward comprehensive end user dashboard functionality and parity between the Windows application and the Modern Browser Experience, different, underlying technologies utilized to develop the clients will potentially prevent exact replication of dashboards in both clients. Additionally, the architecture used to support interface styling is different between the clients, causing dashboards designed for one client to look dissimilar 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 dashboards.

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.



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.

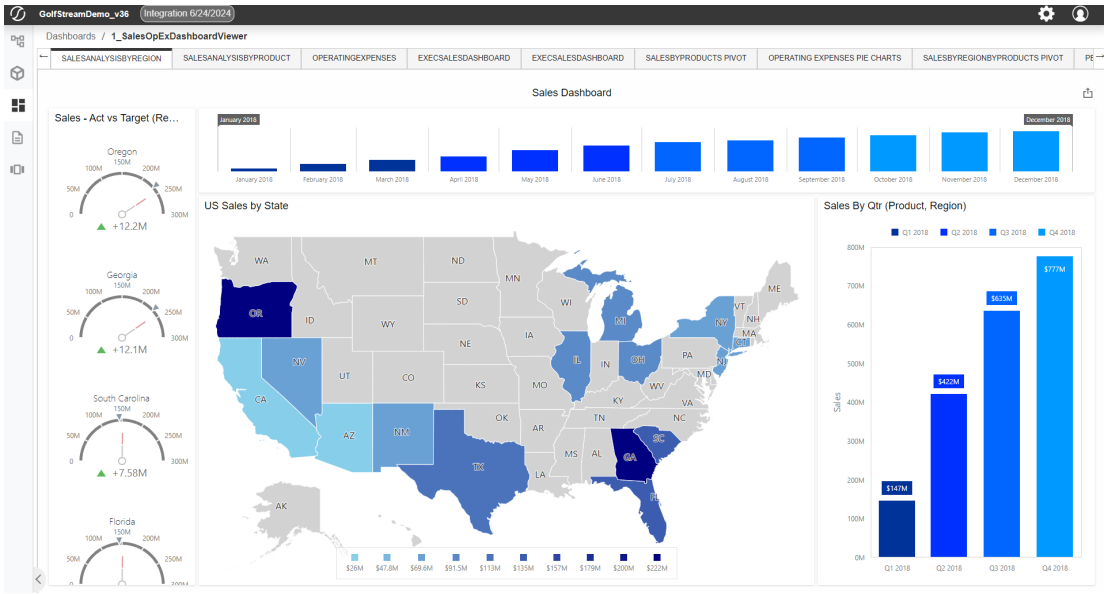
Preexisting and newly created dashboards will be set to the Windows application only by default. Dashboards are not initially visible. Dashboards always render in Workflows.

Notable Differences from Windows Application

Dashboard Components

BI Viewer

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



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

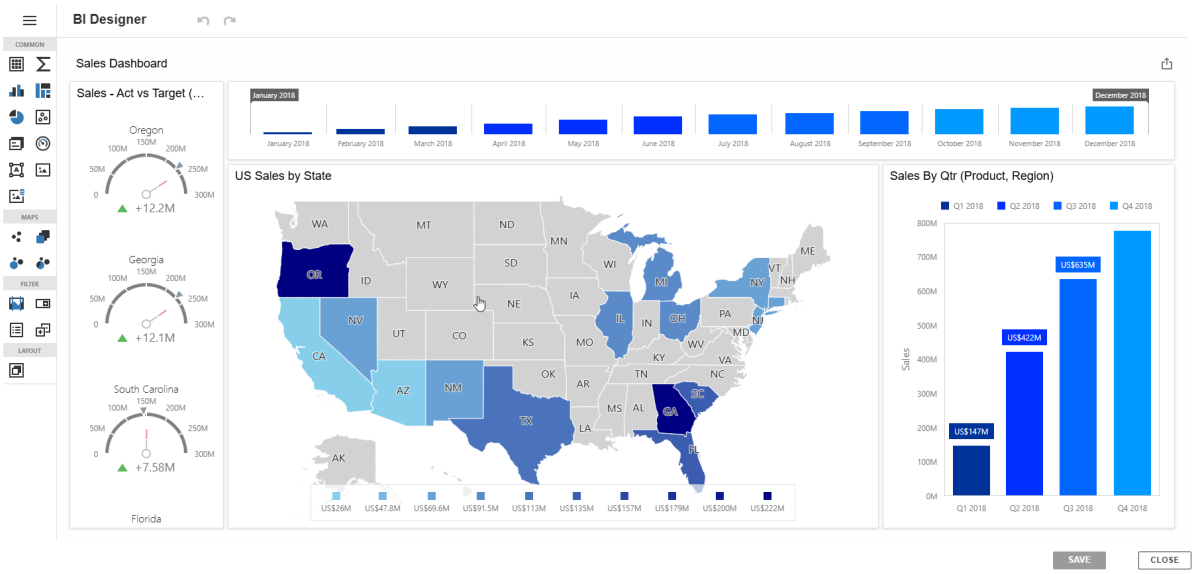
Observed Behavior	Cause	Resolution
Infinite Loading Screen Appears	A filter is set to a question mark (?).	Update the filter to be set to an empty string. Validated in browser and WinApp.
Infinite Loading Screen Appears	A Calculated Field is set to a decimal without a leading zero. (Example: .2).	Update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

BI Viewer Designer

BI Viewer Designer allows users to modify components directly in the Modern Browser Experience without navigating back to the Windows Application. The BI Designer Interface is currently only available to users who have permissions to edit the dashboard. Depending on the BI Viewer configurations, users may open the BI Designer Interface using the following methods:

- If the BI Viewer has a title, then a pencil icon will appear on the right side of the title bar.
- If the BI Viewer does not have a title, then a pencil icon will appear in a hover-over menu on each component.

BI Viewer Designer includes most of the same functions available in the Windows Application in a new browser-optimized layout. Component settings, like save or data sources, are found in the upper left menu. Users can add components using the tool bar at the left. Each component includes its own hover-over menu to modify component-specific settings. The browser BI Viewer Designer does not support adding data adapters or creating BI Viewer components from scratch. These steps must be done in the OneStreamWindows Application before they can be modified in the browser. See BI Viewer Designer documentation for more information.

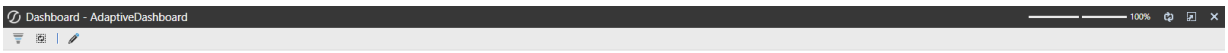


Embedded Dashboards

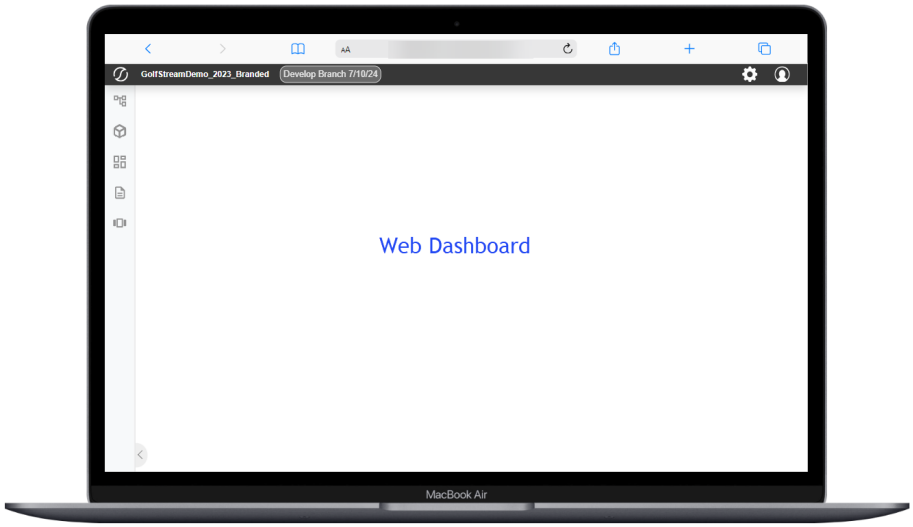
New client/device specific dashboards configurations allow a single root dashboard to render different embedded dashboards depending on the client or device type. (More details on the use of this configuration are described within the Multi-Client/Device Dashboard Design Approaches below)

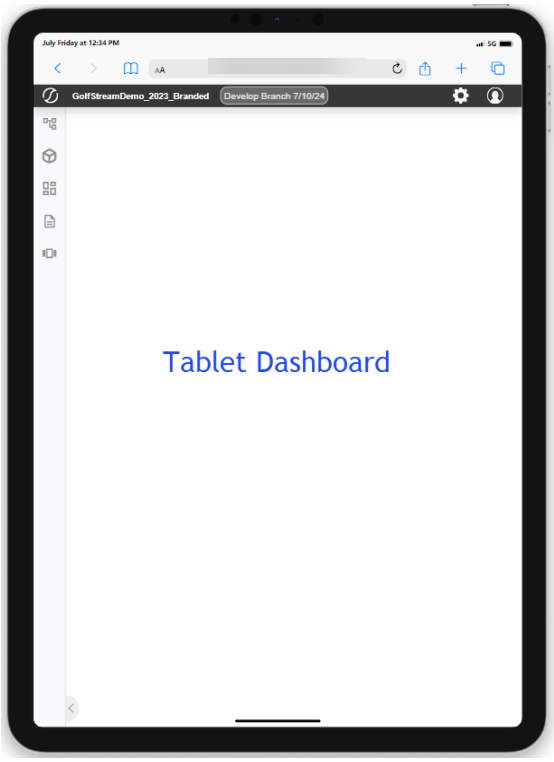
Component Properties

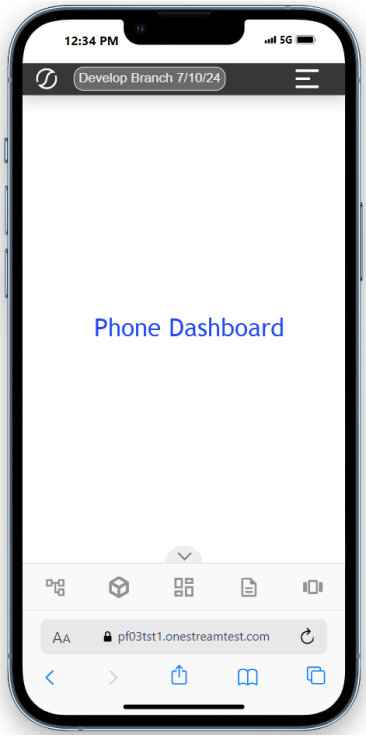
General (Component)	
Name	emb_Controlls
Workspace	Default
Maintenance Unit	Add Dimension Member (ADM)
Description	
Component Type	Embedded Dashboard
Processing	
Template Name Suffix	
Template Parameter Values (e.g., Param1=Value1, ...)	
Text 1	
Text 2	
Embedded Dashboard	
Embedded Dashboard	AdaptiveDashboardWinApp
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


GolfStreamDemo_2023_Branded
Develop Branch 7/10/24
Web Dashboard
MacBook Air


GolfStreamDemo_2023_Branded
Develop Branch 7/10/24
Tablet Dashboard

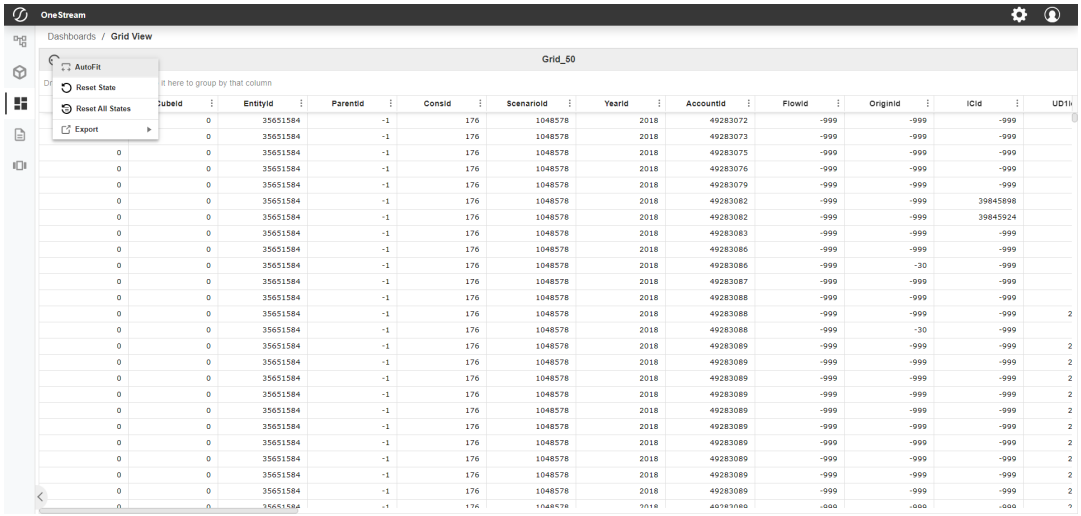

12:34 PM
5G
Develop Branch 7/10/24
Phone Dashboard
AA
pf03tst1.onestreamtest.com

Text Box

The Find and Replace formatting options are currently not available when using Rich Text in the Modern Browser Experience.

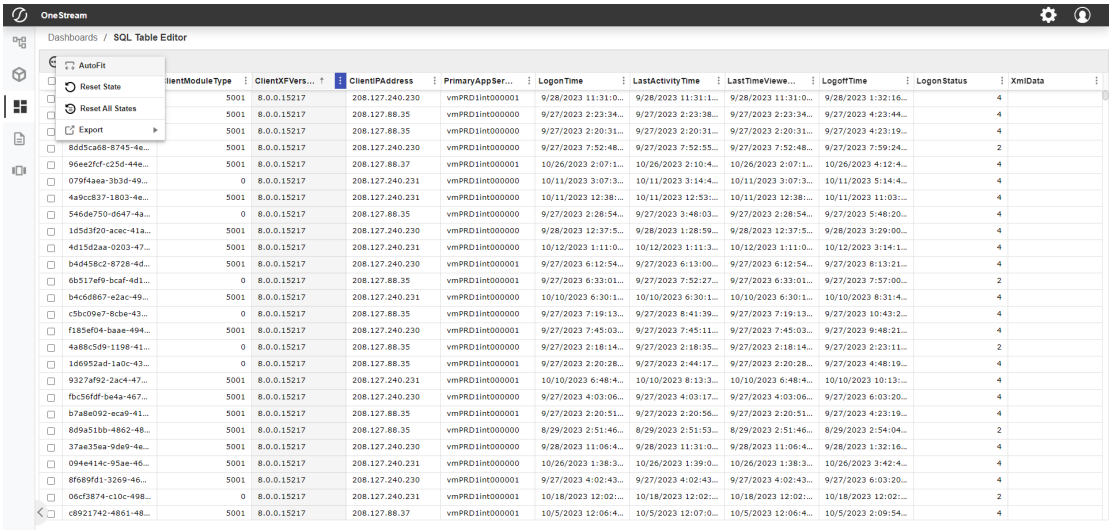
Grid View

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.



☐	1	0	Houston	Actual	2019M1	Chef master	Johnson	John
☐	122	0						
☑	12345	0	Profitability_Defau...	Actual	2017M1	Manager	Illescas	Rosa
☐	123455	0				QA Manager		
☐	132	0						
☐	2	0	Houston	Actual	2019M1	waiter	Andrews	Andrew

Grid Keyboard Functionality

The browser experience includes basic keyboard shortcuts. See Appendix E for more information.

Large Data Pivot Grid & Pivot Grid

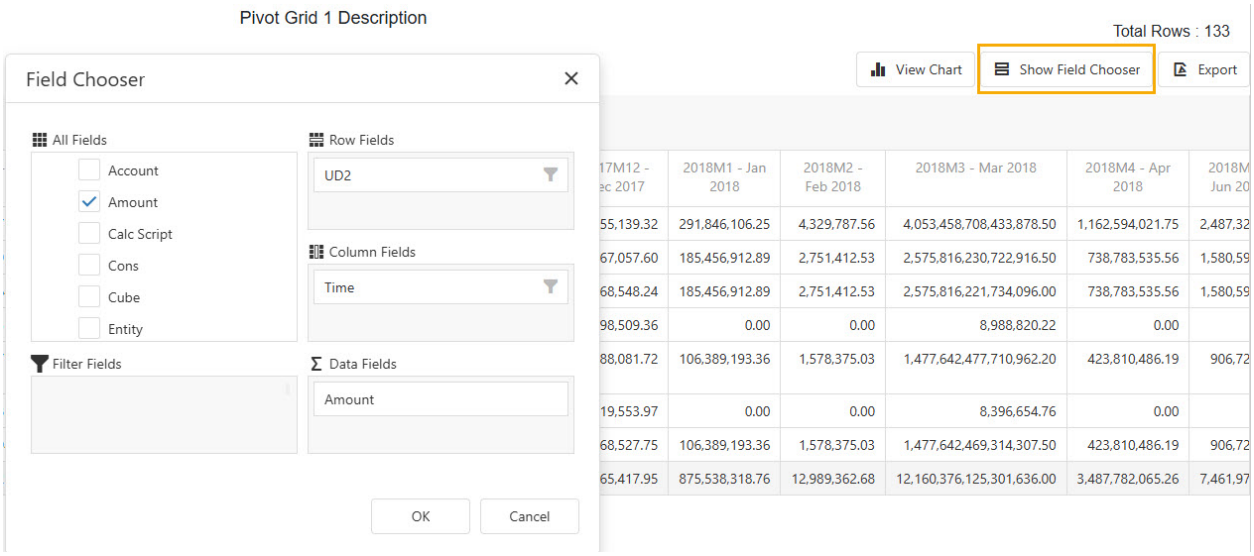
Pivot Grids in the browser now come with a streamlined configuration, and a modernized interface, while maintaining compatibility with existing workflows like the ability to drag and drop fields. Both Pivot Grids and Large Data Pivot Grids benefit from updated data processing that ensures all data is available for aggregation.

Notable Differences in Pivot Grids

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

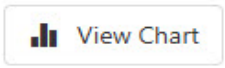
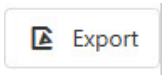
A count of total rows in the dataset is displayed on the top right of the pivot grid.

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



In the Field Chooser dialog box, you can select or clear any field in the All Fields section or drag and drop any field into the Row Fields, Column Fields, Data Fields or Filter Fields. Field selections update at real time once you select the OK button and close the Field Chooser dialog box. Filtering options are available for each field.

Button	Action

	Displays bar chart above the grid. **NOTE:** Once the View Chart button is clicked, it changes to the Hide Chart button.
	Opens Field Chooser dialog box.
	Exports to an .xslx file.

Charts in Pivot Grids

When the chart is displayed, you can hover the mouse over any of the bars for more information.

> **NOTE:** Bar charts are the only available chart type at this time.

Keyboard Controls in Pivot Grids

A wide array of functions allow users to interact with Pivot Grids using keyboard shortcuts. See Appendix E for a full list of interactions.

Advanced Charts

There are some charts and configuration properties that are not currently supported. See Appendix A 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, OneStreamfunctions such as refresh documents, show field codes, and hide field codes are also available in the browser. One key difference of this feature is that the Review tab is not currently available.

Filter Editor

The Filter Editor component gives users a visual interface for modifying and applying advanced logic to filters. While most operators are available in the browser, the following are not currently supported: *Not And*, *Not Or*, and *Not Between* (Numeric Values). Only Equals and Does Not Equal generate a data bound drop-down list. Other operators render a text box.

See Dashboard Filter Editor in the Design and Reference Guide for more information.

Maps

Hover-over images for shapes on Maps are not currently available.

Menu

Menu component images expand to fit all available space in the Modern Browser Experience. Ensure that the image source being used is set to 96 DPI for consistent display in the Modern Browser Experience and the Windows Application.

Spreadsheet

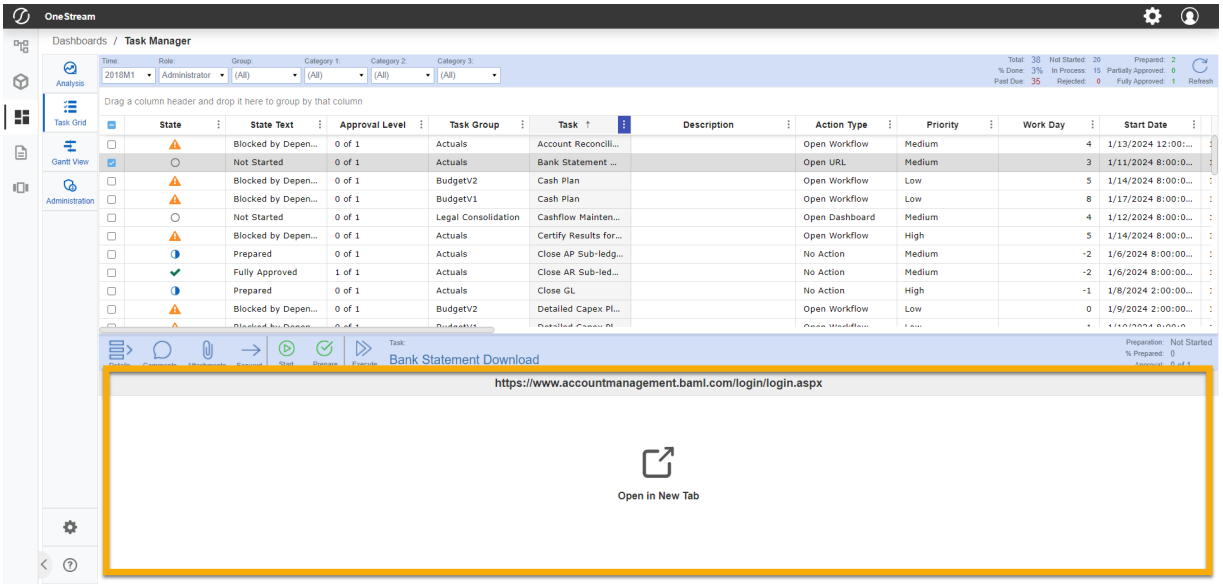
The Modern Browser Experience's Spreadsheet feature provides users with the ability to utilize spreadsheet functionality similar to the Excel Add-in directly through the browser. Spreadsheet behaves similar in the browser experience as it does in the Windows Application. Refer to Appendix B for supported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

Web Content

By default, Web Content is opened in a new tab in the browser. The content may also be rendered directly in a dashboard using an iframe by modifying the following component configuration:

- Open Content in New Tab (Web Only) - Set the value of this field to "False" to open web content in an iframe.

> **NOTE:** Not all websites are compatible with iframes and some may be blocked from rendering in an iframe. Thorough testing of all use cases for Target URLs is strongly encouraged.



Notable Dashboard Functionality Gaps

Dashboard Layouts

- Canvas
- Dock
- Wrap

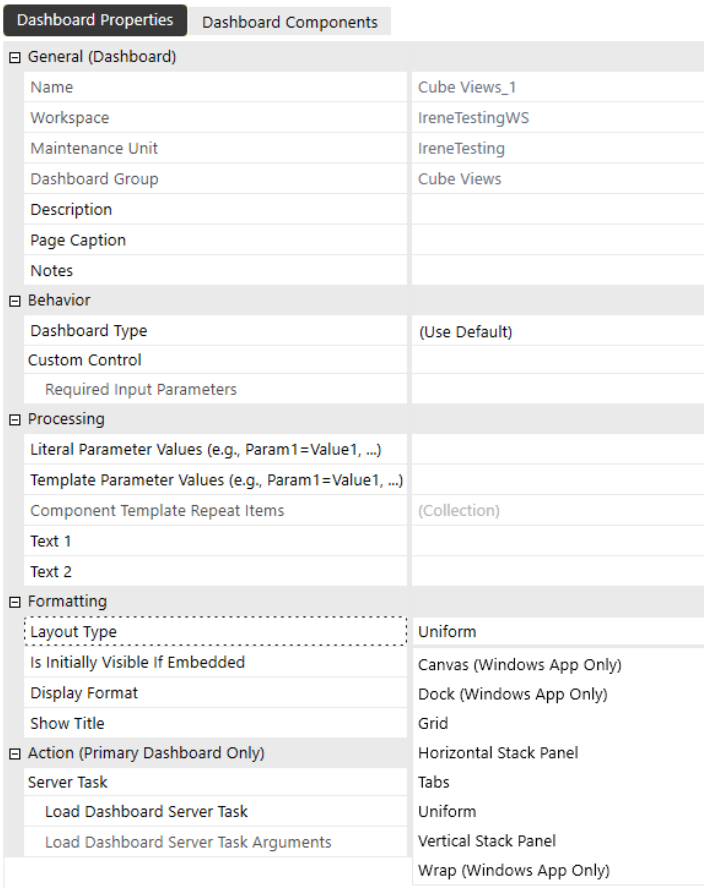
Dashboard Components

- Basic Charts
- Password Box
- Sankey Diagram
- State Indicator

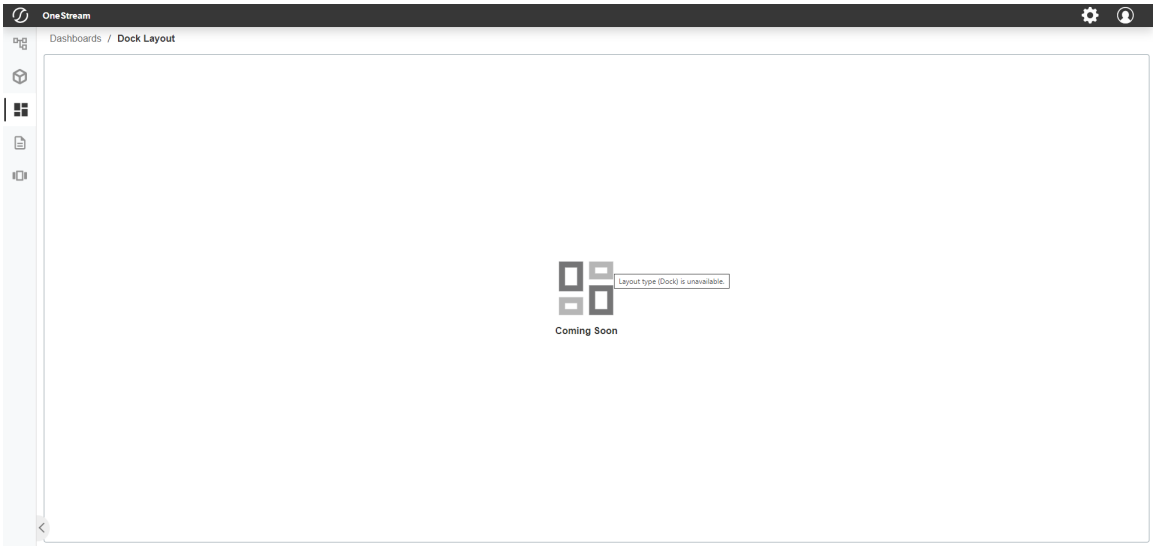
Navigating Dashboard Gaps

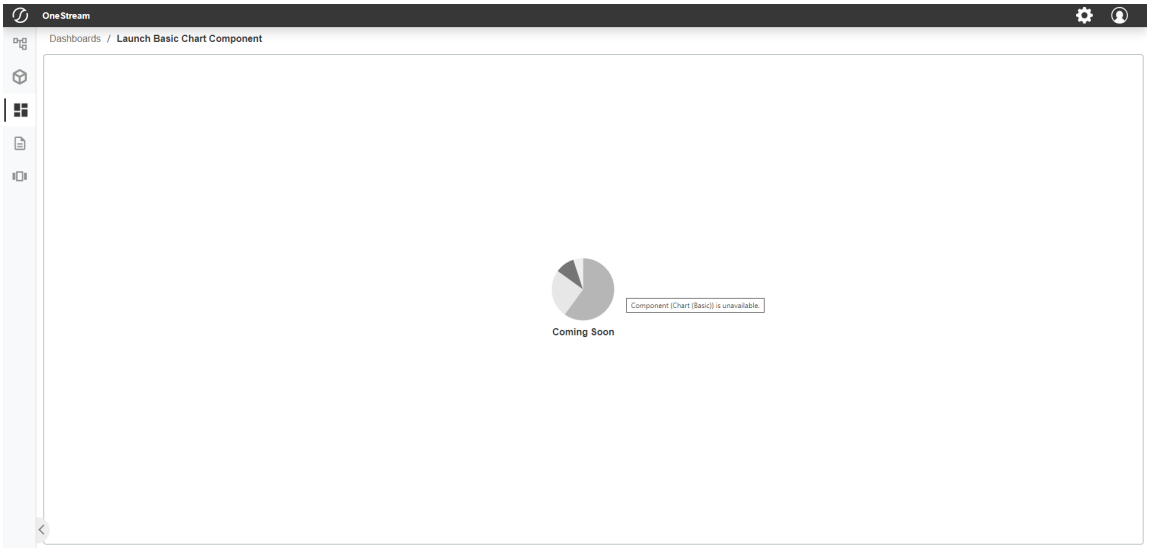
Helpful tips have been added to both the Windows application and the Modern Browser Experience to assist dashboard designers and end users in identifying dashboard layouts and components that are not yet supported on the browser.

In the Windows application, 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.





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 application 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 application and Modern Browser Experience simultaneously. Using the Windows application, 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 application, 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 application.

Dashboard Accessibility Design Approaches

OneStream Dashboard components are configured to support standard accessibility guidelines, allowing for users to navigate through elements using the keyboard and for screen readers to convey element names, contextual roles, and values (as applicable). Element names are conveyed based on a component's configured name or description and the component type reflects the role..

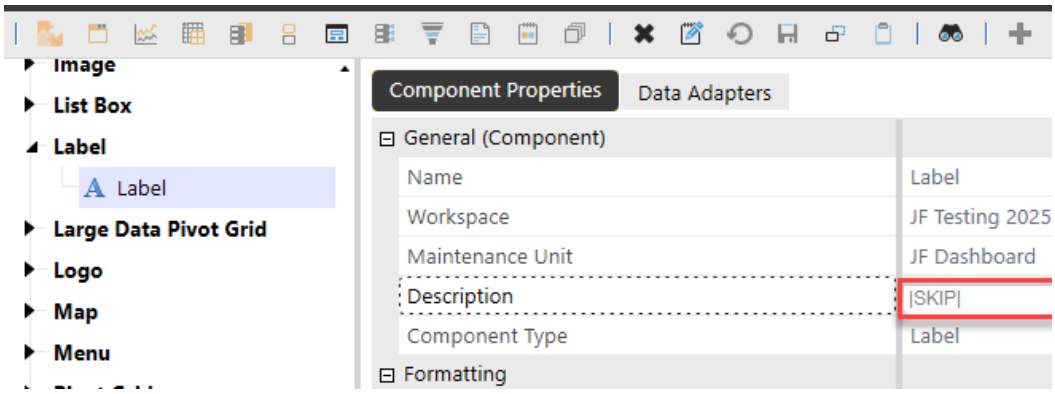
The following optional dashboard components have some accessibility limitations:

- Advanced Charts
- BI Viewer
- Filter Editor

- Map
- Large Data Pivot Grid
- Pivot Grid
- Text Editor

Dashboards are highly customizable so it is important to design with accessibility in mind, leveraging properties such as font, color, sizing, and use of parameters, among many others.

Image and Label dashboard components can now be configured to skip through UI elements that don't contain content while using keyboard controls to navigate. To configure an Image or Label component so it can be skipped, type **|SKIP|** in the description field of the component in the Component Properties tab.



Additionally, keyboard users will see a link appear when they bring focus to an embedded dashboard that enables them to move past the content contained in that dashboard and navigate directly to the next embedded dashboard in the page, providing additional efficiency by allowing for quicker navigation through content-rich dashboards.

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 application 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

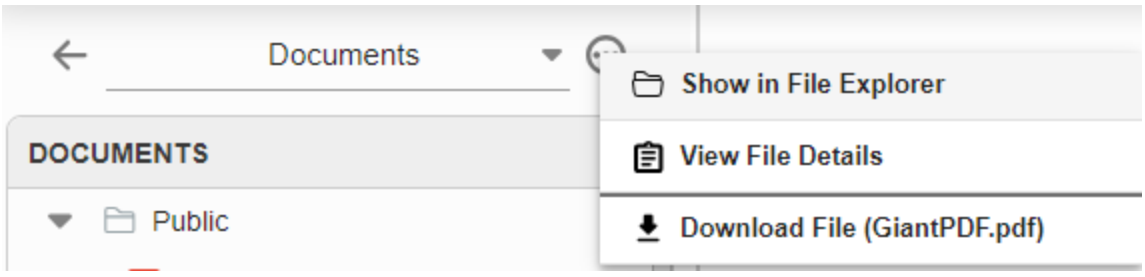
This approach uses a single adaptive dashboard. Designers need an initial understanding of how their dashboard should adapt to each client or device type intended for use. The designer creates Embedded Dashboards with configurations that link to client/device specific dashboards. The Embedded Dashboards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

Documents

The Documents panel in the Modern Browser Experience offers an intuitive interface based on the design of the Windows Platform. Files accessed through the browser can only be downloaded to the user's local machine and cannot be opened in local applications due to security concerns. Additionally, a context menu has been implemented at the top of the Documents area that provides a button to download selected documents. This context menu also provides a button to open the File Explorer dialog and view File Details. The File Details can be viewed by double-clicking a file name.

When a folder is selected, the context menu provides specific options to open the folder in File Explorer and or view the Folder Details.



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

> **NOTE:** When downloading files from OneStream, users may need to update the file associations on their devices in order to recognize OneStream specific file extensions.

POV

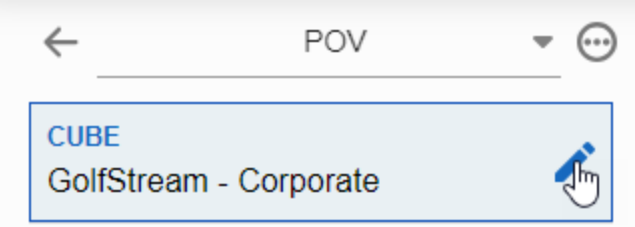
The POV panel can be accessed from the OnePlace toolbar and can be used to view and modify the current Cube POV. Similar to Workflow POV, the Cube POV menu is presented as an overlay instead of a floating dialog. Notably, information from the Windows Platform POV menu is displayed in a two different areas in the browser:

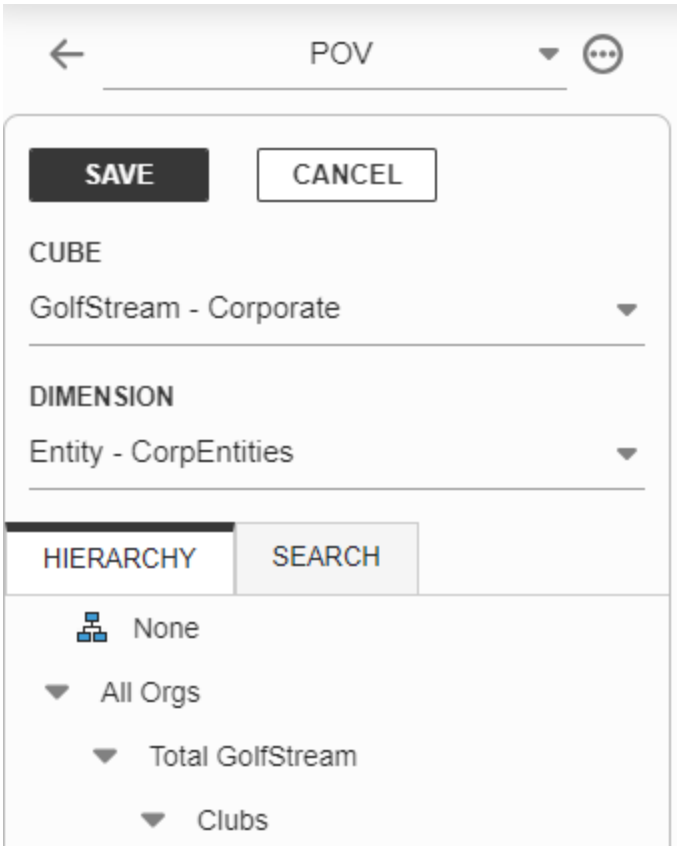
- **Global POV**: Select the gear icon in the application header to view current Global POV.
- **Workflow POV:** Navigate to Workflow from the OnePlace panel to view and modify the current Workflow POV.

Additional Features

Modify a POV

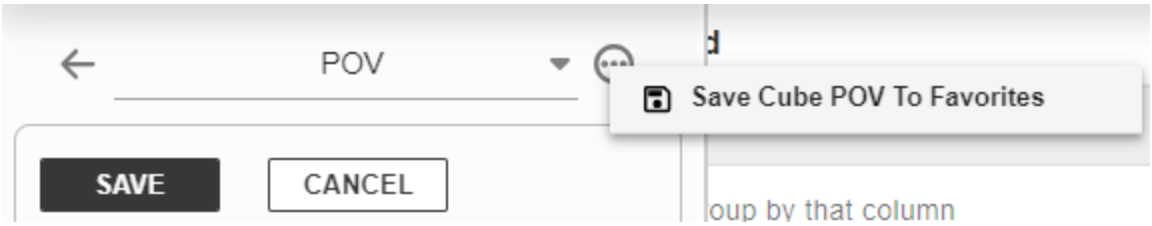
To modify a POV, click the pencil icon next to each field, make your modification, and click Save.





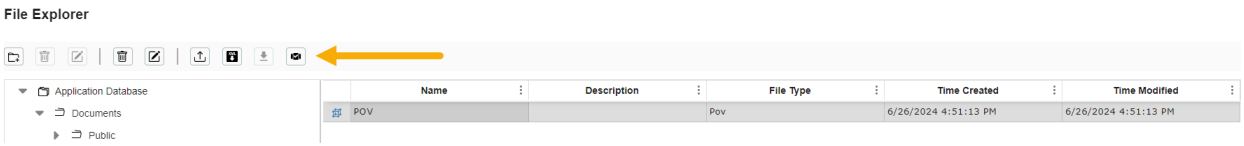
Save a POV

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



Apply 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 select an item with the file type of POV selected to see the button. POV can only be applied through the File Explorer.



Appendix A: 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, Waterfall
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
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 by the Advanced Charts dashboard component.

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	Total Included in Series

Appendix B: Spreadsheet Features and Functionality

To access the Spreadsheet component in the Modern Browser Experience, you must embed it within a dashboard.

Supported Spreadsheet Features and Functionality

Component Integration	• Dashboards • Workflow Forms

Data Sources and Related Functionality	• Spreadsheet Files
	  ◦ Create, open, edit, and save
	• Cube View Connections
	  ◦ Create, display, edit, and remove
	  ◦ Refresh data and submit changes
	  ◦ Support for Cube View formatting
	• Table View Definitions
	  ◦ Create, display, edit, and remove
	  ◦ Refresh data and submit changes
	• Retrieve Functions
	  ◦ Supported Functions
	  ▪ XFGetCell, XFGetCell5, XFGetFXRate, XFGetCalculatedFxRate, XFGetMemberProperty, XFGetRelationshipProperty, XFGetHierarchyProperty, XFGetMemberInfo XFSetCell , XFSetFXRate
	  ▪ Refresh data and submit changes (XFSetCell only)

Ribbon Functions	• 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	• Limited Chart Types • Color Customization

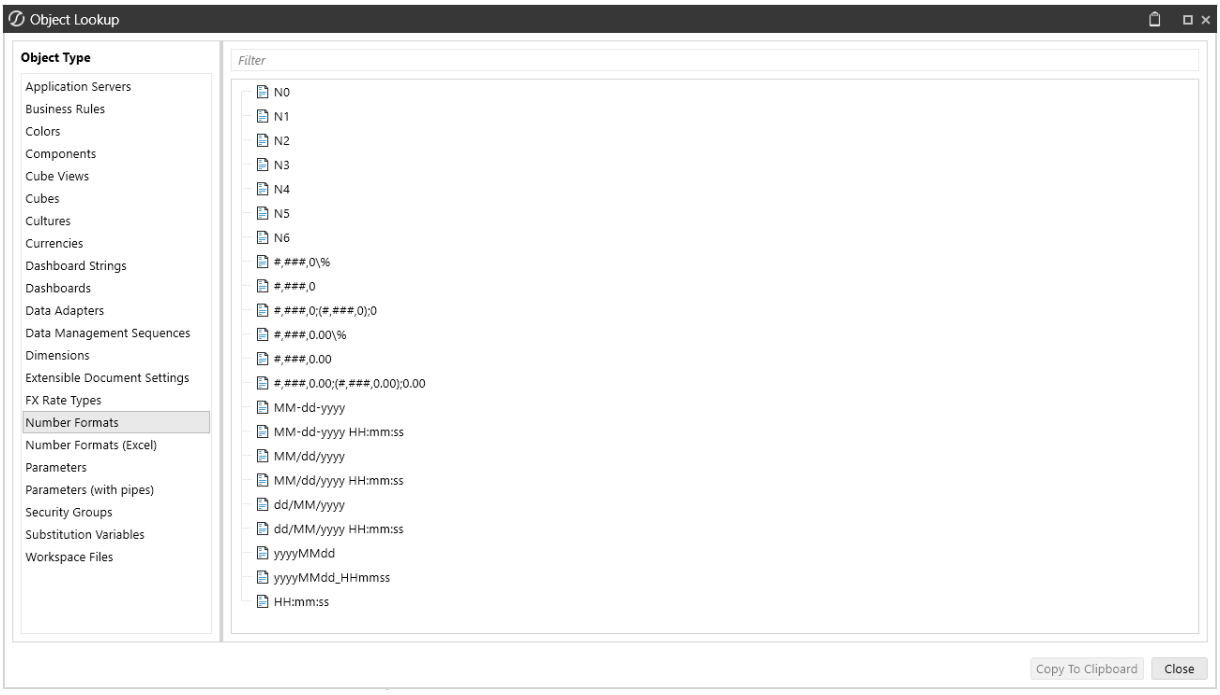
Functions	• Quick Views
	• Formula Bar
	• Macros
	• Solver
	• Sheet References
	• Document Properties
	• Context Menu Features and Functions
	• Insert Copied/Cut Cells
	• Keyboard Controls:
	  ◦ Shift + End
	  ◦ Ctrl + PageUp / Ctrl + PageDown (does not set tab focus)
	  ◦ Ctrl + N (overwrites spreadsheet with unsaved changes)

Formatting	• Preview Font Formats • Conditional Formatting • Cell Borders (last selection is reset after format is applied)

Appendix C: Supported Number Formats

The following formats for numbers and dates are currently supported in the Modern Browser Experience for these components:

- Cube Views
- Dynamic Grids
- Grid Views
- SQL Table Editor



Appendix D: Smart Link APIs

Create Smart Link

The following business rules create Smart Links and allow developers to provide dynamic parameters (Custom Substitution Variables) using name-value pairs. In the code snippets below, link expiration is set to 240 hours (10 days) and outputs the Smart Link in a message box. Optionally, the link can direct a user to a different OneStream environment using *Host Override* or append a custom name to the end of the Smart Link URL using *Custom Name*.

C# Code Snippet:

```
public XFSelectionChangedTaskResult CreateSmartLink(SessionInfo si, BRGlobals globals,
object api, DashboardExtenderArgs args)
        {
            // Create new smart link and set expiration
            var smartlink = new XFSmartLink();
            smartlink.IsSystemlevel = true;
            smartlink.ExpirationDateUtc = DateTime.UtcNow.AddHours(240);

            // Optional Properties
            // Host override: Allows to change the host value. Must be a value host
            //smartlink.HostOverride = "https://buxtest.com:444";

            // Custom Name: Adds a suffix at the end of the smart link. Alphanumeric, 50
characters max.
            //smartlink.CustomName = "ThisIsACustomName";

            var dashboard = new XFSmartLinkDashboard();

            // Change values below to target different applications/ Dashboards
            dashboard.ApplicationName = "GolfStreamDemo_v36";
            dashboard.DashboardName = "SmartLinks";
            dashboard.WorkspaceName = "Default";
            dashboard.DashboardProfileName = "Default";
            dashboard.CustomSubstVars = new Dictionary<string, string>();

            // Add/ Remove the lines below to modify the custom subst vars that will be
applied.
            dashboard.CustomSubstVars.Add("parameter1", "value");
            dashboard.CustomSubstVars.Add("parameter2", "value2");
```

```
            smartlink.TargetObject = dashboard;

            string sValue = BRApi.State.CreateSmartLink(si, smartlink);
            var match = System.Text.RegularExpressions.Regex.Match(sValue, @"share/([A-Z0-9]
{32})");

            BRApi.Dashboards.Parameters.SetLiteralParameterValue(si, false, "slid",
match.Groups[1].Value);

            var result = new XFSelectionChangedTaskResult();
            result.IsOK = true;
            result.ShowMessageBox = true;
            result.Message = sValue;
            return result;
        }
```

VB Code Snippet:

```
Public Function CreateSmartLink(ByVal si As SessionInfo, ByVal globals As BRGlobals, ByVal
api As Object, ByVal args As DashboardExtenderArgs) As XFSelectionChangedTaskResult
            ' Create new smart link and set expiration
            Dim smartlink = New XFSmartLink()
            smartlink.IsSystemlevel = True
            smartlink.ExpirationDateUtc = DateTime.UtcNow.AddHours(240)

            ' Optional Properties
            ' Host override: Allows To change the host value. Must be a value host
            'smartlink.HostOverride = "https://buxtest.com:444"

            ' Custom Name: Adds a suffix at the End Of the smart link. Alphanumeric, 50
characters max.
            'smartlink.CustomName = "ThisIsACustomName"

            Dim dashboard = New XFSmartLinkDashboard()

            ' Change values below to target different applications/ Dashboards
            dashboard.ApplicationName = "GolfStreamDemo_v36"
            dashboard.DashboardName = "SmartLinks"
            dashboard.WorkspaceName = "Default"
            dashboard.DashboardProfileName = "Default"
            dashboard.CustomSubstVars = New Dictionary(Of String, String)()

            ' Add/ Remove the lines below to modify the custom subst vars that will be
applied.
            dashboard.CustomSubstVars.Add("parameter1", "value")
            dashboard.CustomSubstVars.Add("parameter2", "value2")

            smartlink.TargetObject = dashboard

            Dim sValue As String = BRApi.State.CreateSmartLink(si, smartlink)
            Dim match = System.Text.RegularExpressions.Regex.Match(sValue, "share/([A-Z0-9]
{32})")
```

```
            BRApi.Dashboards.Parameters.SetLiteralParameterValue(si, False, "slid",
match.Groups(1).Value)

            Dim result = New XFSelectionChangedTaskResult()
            result.IsOK = True
            result.ShowMessageBox = True
            result.Message = sValue
            Return result
        End Function
```

Retrieve Smart Link

Smart Links are stored for a set period of time. Using the following business rules, developers can retrieve a stored Smart Link using slid (Smart Link ID)

C# Code Snippet:

```
public XFSelectionChangedTaskResult GetSmartLink(SessionInfo si, BRGlobals globals, object
api, DashboardExtenderArgs args)
        {
            var id = BRApi.Dashboards.Parameters.GetLiteralParameterValue(si, false,
"slid");

            var guidId = Guid.Parse(id);
            XFSmartLink sValue = BRApi.State.GetSmartLink(si, true, guidId);
            var text = System.Text.Json.JsonSerializer.Serialize(sValue);

            var result = new XFSelectionChangedTaskResult();
            result.IsOK = true;
            result.ShowMessageBox = true;
            result.Message = text;
            return result;
        }
```

VB Code Snippet:

```
Public Function GetSmartLink(ByVal si As SessionInfo, ByVal globals As BRGlobals, ByVal api
As Object, ByVal args As DashboardExtenderArgs) As XFSelectionChangedTaskResult
            Dim id = BRApi.Dashboards.Parameters.GetLiteralParameterValue(si, False, "slid")

            Dim guidId = Guid.Parse(id)
            Dim sValue As XFSmartLink = BRApi.State.GetSmartLink(si, True, guidId)
```

```
            Dim text = System.Text.Json.JsonSerializer.Serialize(sValue)

            Dim result = New XFSelectionChangedTaskResult()
            result.IsOK = True
            result.ShowMessageBox = True
            result.Message = text
            Return result
        End Function
```

Delete Smart Link

The following business rules delete stored Smart Links.

C# Code Snippet:

```
public XFSelectionChangedTaskResult DeleteSmartLink(SessionInfo si, BRGlobals globals,
object api, DashboardExtenderArgs args)
        {
            var id = BRApi.Dashboards.Parameters.GetLiteralParameterValue(si, false,
"slid");
            var guidId = Guid.Parse(id);

            BRApi.State.DeleteSmartLink(si, true, guidId);
            var text = "Deleted";

            var result = new XFSelectionChangedTaskResult();
            result.IsOK = true;
            result.ShowMessageBox = true;
            result.Message = text;
            return result;
        }
```

VB Code Snippet:

```
    Public Function DeleteSmartLink(ByVal si As SessionInfo, ByVal globals As BRGlobals,
ByVal api As Object, ByVal args As DashboardExtenderArgs) As XFSelectionChangedTaskResult
            Dim id = BRApi.Dashboards.Parameters.GetLiteralParameterValue(si, False, "slid")
            Dim guidId = Guid.Parse(id)

            BRApi.State.DeleteSmartLink(si, True, guidId)
            Dim text = "Deleted"

            Dim result = New XFSelectionChangedTaskResult()
            result.IsOK = True
```

```
            result.ShowMessageBox = True
            result.Message = text
            Return result
        End Function
```

Modify Smart Link

The following business rules are designed to overwrite an existing Smart Link while retaining its URL. Since modifying a link overwrites all stored values, all required values need to be provided when using this rule.

C# Code Snippet:

```
public XFSelectionChangedTaskResult ModifySmartLink(SessionInfo si, BRGlobals globals,
object api, DashboardExtenderArgs args)
        {
            var id = BRApi.Dashboards.Parameters.GetLiteralParameterValue(si, false,
"slid");
            var guidId = Guid.Parse(id);

            var smartlink = new XFSmartLink();
            smartlink.IsSystemlevel = true;
            smartlink.ExpirationDateUtc = DateTime.UtcNow.AddHours(240);

            var dashboard = new XFSmartLinkDashboard();

            // Change values below to target different applications/ Dashboards
            dashboard.ApplicationName = "GolfStreamDemo_v36";
            dashboard.DashboardName = "Modified";
            dashboard.WorkspaceName = "Default";
            dashboard.DashboardProfileName = "Default";
            dashboard.CustomSubstVars = new Dictionary<string, string>();

            // Add/ Remove the lines below to modify the custom subst vars that will be
applied.
            dashboard.CustomSubstVars.Add("parameter1", "test");
            dashboard.CustomSubstVars.Add("parameter2", "value2");
            dashboard.CustomSubstVars.Add("parameter3", "value3");
            dashboard.CustomSubstVars.Add("parameter4", "value4");

            smartlink.TargetObject = dashboard;

            BRApi.State.ModifySmartLink(si, true, guidId, smartlink);

            var result = new XFSelectionChangedTaskResult();
            result.IsOK = true;
```

```
            result.ShowMessageBox = true;
            result.Message = "Modified";
            return result;
        }
    }
}
```

VB Code Snippet:

```
        Public Function ModifySmartLink(ByVal si As SessionInfo, ByVal globals As BRGlobals,
ByVal api As Object, ByVal args As DashboardExtenderArgs) As XFSelectionChangedTaskResult
            Dim id = BRApi.Dashboards.Parameters.GetLiteralParameterValue(si, False, "slid")
            Dim guidId = Guid.Parse(id)

            Dim smartlink = New XFSmartLink()
            smartlink.IsSystemlevel = True
            smartlink.ExpirationDateUtc = DateTime.UtcNow.AddHours(240)

            Dim dashboard = New XFSmartLinkDashboard()
            dashboard.ApplicationName = "GolfStreamDemo_v36"
            dashboard.DashboardName = "Modified"
            dashboard.WorkspaceName = "Default"
            dashboard.DashboardProfileName = "Default"
            dashboard.CustomSubstVars = New Dictionary(Of String, String)()

            ' Change values below to target different applications/ Dashboards
            dashboard.CustomSubstVars.Add("parameter1", "test")
            dashboard.CustomSubstVars.Add("parameter2", "value2")
            dashboard.CustomSubstVars.Add("parameter3", "value3")
            dashboard.CustomSubstVars.Add("parameter4", "value4")

            smartlink.TargetObject = dashboard

            BRApi.State.ModifySmartLink(si, True, guidId, smartlink)

            Dim result = New XFSelectionChangedTaskResult()
            result.IsOK = True
            result.ShowMessageBox = True
            result.Message = "Modified"
            Return result
        End Function
    End Class
End Namespace
```

Appendix E: Component Keyboard Controls

All Components

Component	Controls

BI Viewer	• **Tab** and **Shift** + **Tab** keys navigate between the following elements in the Dashboard layout:
	  ◦ Dashboard Title
	  ◦ Tab Container - Tab Page Titles
	  ◦ Groups
	  ◦ Dashboard Items
	• When you select a dashboard item, press **Enter** to switch to interactive mode. This mode allows you to navigate within the item.
	• In interactive mode, you can use the **Tab** and **Shift** + **Tab** keys to navigate through the title elements and the dashboard element's content.
	• A user can use the following keys to interact with the Document Viewer component:
	• **Tab (Shift+Tab)** navigates between dashboard layout elements. In Interactive mode, navigates within a dashboard item.

Component	Controls
	• **Enter** switches to Interactive mode when the focus is on a dashboard item and expands or collapses a panel when a button is selected in the Tab panel. • **Esc or Escape** exits Interactive mode.
Book Viewer	• **Tab** moves the focus to the next element. • Shift + Tab moves the focus to the preceding element. • **Enter** clicks the focused element. • **Right arrow** moves the paging control to the next page. • **Left arrow** moves the paging control to the previous page. • **Up arrow** moves the document up. • **Down arrow** moves the document down.
Button	• **Space** clicks the focused button. • **Enter** clicks the focused button.

Component	Controls
Chart (Waterfall)	• **Left arrow** moves the focus to the left point in the series. • **Right arrow** moves the focus to the right point in the series. • **Up arrow** moves the focus according to the database order. Pressing the Up arrow key navigates through items based on their order in the database. • **Down arrow** moves the focus according to the database order. Pressing the Down arrow key navigates through items based on their order in the database.
Checkbox	• **Space** clicks the focused check box. • **Enter** clicks the focused check box.

Component	Controls
Combo Box	• **Alt + Down** opens the popup element when the component is focused. • **Alt + Up** closes the popup element if it is open. • **Esc or Escape** closes the popup element if it is open. • **Up arrow** moves the focus to the previous item in the list. • **Down arrow** moves the focus to the next item in the list. • **Home** moves the focus to the first item in the list. • **End** moves the focus to the last item in the list. • **Enter** selects the currently focused item (for example, if you are filtering by typing this would be the first item that matches the filter).

Component	Controls
Cube View	• **Tab** moves the focus to the next cell in the row or the first cell in the next row. • **Shift + Tab or Shift + Right arrow** selects the next cell in the row or the first cell in the next row. • **Shift + Left arrow** selects the preceding cell in the row or the last cell in the preceding row. • **Shift + Backspace** deselects a cell from a group of selected cells. • **Right arrow** moves the focus to the next cell in the row or the first cell in the next row. • **Left arrow** moves the focus to the preceding cell in the row or the last cell in the preceding row. • **Up arrow** moves the focus to the cell above the selected cell. • **Down arrow** moves the focus to the cell below the selected cell. • **Enter** moves the focus to the cell below the selected cell.

Component	Controls
	• **Shift + F10** opens the context menu from the tool bar. • **Menu** opens the context menu for the selected cell. • **F2** enables edit mode for the selected cell. • **F4** moves the focus backwards to the cell to the left of the currently selected cell. If you are at the first cell in a column and there are rows above the cell, F4 moves the focus up one row and to the last cell in the farthest right column. If you are in the first cell of the grid, F4 moves the focus up to the tool bar to the context menu. • **Esc or Escape** exits edit mode for the selected cell.
Data Explorer Report	• **Tab** moves the focus to the next element. • **Enter** clicks the focused element. • **Right arrow** moves the paging control to the next page. • **Left arrow** moves the paging control to the previous page.

Component	Controls
Date Selector (Date Input)	• **Alt + Down arrow** opens the popup with the calendar. • **Alt + Up arrow** or **Esc** closes the popup with the calendar. • **Up arrow** increases the value of the date portion that contains the cursor. Takes the corresponding Step into account. • **Down arrow** decreases the value of the date portion that contains the cursor. Takes the corresponding Step into account. • **Left arrow** moves the cursor one position to the left. • **Right arrow** moves the cursor one position to the right. • **Delete** or **Backspace** deletes the current date portion that contains the cursor.

Component	Controls
Date Selector (Calendar)	• **Down Arrow** moves the focus to down cell, or navigates the view if currently focused date is in the last row of the current view period. • **Up Arrow** moves the focus to the upper cell, or navigates the view if currently focused date is at the top row of the current view period. • **Left Arrow** moves the focus to previous cell. • **Right Arrow** moves the focus to next cell. • **Enter** toggles the current date selection. • **Ctrl + Up Arrow** navigates to the upper view (for example., from current month days, to the year). • **Ctrl + Down Arrow** navigates to the lower view (for example, from the months in the year to the days of the month). • **Ctrl + Right Arrow** navigates to the next period. • **Ctrl + Left Arrow** navigates to the previous period.

Component	Controls
	• **Tab** moves the focus between the different navigation elements - view selection, previous/next buttons, today button, and the grid with dates/months/years. • **Shift + Tab** moves backwards through thefocusable elements. • **Home** focuses the first day of the month. • **End** focuses the last day of the month.
Dialog	• **Arrow Up / Arrow Down** moves the focus between the drawer items. • **Enter** selects the focused page.
File Viewer	• **Tab** moves the focus to the next element. • **Enter** clicks the focused element. • **Right arrow** moves the paging control to the next page. • **Left arrow** moves the paging control to the previous page.

Component	Controls
Gantt View	• **Home** moves focus to first task. • **End** moves the focus to the last task. • **Up Arrow** moves the focus to previous task. • **Down Arrow** moves the focus to next task. • **Left Arrow** scrolls the view to the left. • **Right Arrow** scrolls the view to the right. • **Enter** opens the popup edit form to provide editing of the task. • **Delete** the task gets deleted. • **Alt/Opt(Mac) + Left Arrow** the task is collapsed, if it contains child tasks. • **Alt/Opt(Mac) + Right Arrow** the task is expanded, if it contains child tasks.
Grid View	• See Grid View Controls.
Image	• **Tab** moves the focus to the next image. • **Shift + Tab** moves the focus to the preceding image

Component	Controls
Label	• **Tab** moves the focus to the next label. • **Shift + Tab** moves the focus to the preceding label.
Large Data Pivot Grid	• See Pivot Grid Controls.
Logo	• **Tab** moves the focus to the next image. • **Shift + Tab** moves the focus to the preceding image.
Map	• **Tab** moves the focus to the next element. • **Shift + Tab** moves the focus to the preceding element. • **Enter** clicks the focused element.
Menu	• **Enter** opens a menu when the menu button has focus. • **Up arrow** moves the focus up to the next menu item. • **Down arrow** moves the focus down to the next menu item. • **Esc or Escape** closes the menu.
Pivot Grid	• See Pivot Grid Controls.

Component	Controls
Radio Button Group	• **Arrow keys** move the focus to the next option in the group.
Report	• **Tab** moves the focus to the next element. • **Enter** clicks the focused element. • **Right arrow** moves the paging control to the next page. • **Left arrow** moves the paging control to the previous page.
Text Box	• **Tab** moves the focus into and out of the text box.
Toast Notifications	• **F9** closes all notifications.

Component	Controls
Tree View	• **Up arrow** goes to the previous tree node. • **Down arrow** goes to the next tree node. • **Right arrow** expands a collapsed node. If the node is expanded, focus is moved to its first child node. • **Left arrow** collapses an expanded node. If the node is collapsed, focus is moved to its parent. • **Home** moves the focus to the first node in the tree without opening or closing a node. • **End** moves the focus to the last node in the tree that is focusable without opening a node. • **Enter** selects the focused tree view item when the selection mode is **Single** or **Multiple**. When the selection mode is **Multiple** and there are other selected items, they get deselected. • **Ctrl** + **Enter** selects focused item. When the item is already selected, it gets deselected.

Component	Controls
	• **Shift** + **Enter** when **Multiple** selection is enabled, perform range selection from the previous selected item to the current selected item. Equivalent to Shift+Click.
SQL Table Editor	• See Grid View Controls.

Grid View Controls	
Toolbar	• **Right arrow** and **Left arrow** moves the focus between the toolbar focusable elements. • **Home** focuses to the first focusable element. • **End** focuses to the last focusable element.
Group Header	• **Right arrow** and **Left arrow** moves the focus between the toolbar focusable elements. • **Home** focuses to the first focusable element. • **End** focuses to the last focusable element. • **Delete** or **Backspace** deletes the grouping for the focused field name.

Pager	• **Enter** changes the focus to the first focusable Pager element when the Pager wrapper is focused. • **Escape** changes the focus to the Pager wrapper when an inner Pager element is focused. • **Tab** changes the focus to the next Pager element when an inner Pager element is focused. • **Shift** + **Tab** changes the focus to the previous Pager element when an inner Pager element is focused. • **Left Arrow** loads the previous page (if it exists) when the Pager wrapper is focused. • **Page Up** loads the previous page (if it exists) when the Pager wrapper is focused. • **Right Arrow** loads the previous page (if it exists) when the Pager wrapper is focused. • **Page Down** loads the previous page (if it exists) when the Pager wrapper is focused. • **Home** loads the previous page (if the current page is not already the first one) when the Pager wrapper is focused. • **End** loads the next page (if the current page is not already the last one) when the Pager wrapper is focused.

All Grid Cells	• **Right arrow** moves the focus one cell to the right (if any). • **Left arrow** moves the focus one cell to the left (if any). • **Up arrow** moves the focus one cell up (if any). • **Down arrow** moves the focus one cell down (if any). • **Home** moves the focus to the first cell in the row that contains focus. • **End** moves the focus to the last cell in the row that contains focus. • **Ctrl** + **Home** moves the focus to the first (top-left) data cell in the grid. • **Ctrl** + **End** moves the focus to the last cell in the last loaded row of the Grid. • **Page Down** loads and displays the next page of data. If virtual scrolling is used, scrolls one page down. • **Page Up** loads and displays the previous page of data. If virtual scrolling is used, scrolls one page up. • **Shift** + **Alt** + **B** moves the focus to the first breadcrumb menu. > **NOTE:** Only applicable when the focus is in grids within the Workflow Steps. • **Shift** + **Alt** + **W** moves the focus to the first active Workflow State buttons. > **NOTE:** Only applicable when the focus is in grids within the Workflow Steps.

Grid Data Cells	**All Scenarios** • **Enter** when the grid is in InCell EditMode - EditMode is activated. In hierarchy cell - expands /collapses the detail row. In grouping cell - expands /collapses the group. If the cell contains a focusable element - the focus moves to the first focusable element inside. • **F2** enters edit mode when the Grid is in InCell EditMode. • **Esc** if the editor is opened, cancels the edit and closes the editor. If the focus is on an element inside a cell, returns the focus back to the cell. **Row Selection Scenario** • **Space** selects the row holding the currently focused cell. • **Ctrl + Space** selects or deselects the current row, while persisting previously selected rows (only for selection mode "multiple"). • **Shift** + **Space** performs range selection, selects all the rows between the last selected one (with Space or mouse click) and the one holding the focused cell. • **Shift** + **Up Arrow** selects the row above. When multiple selection is enabled, it extends the selection to that row. • **Shift** + **Down Arrow** Selects the row below. When multiple selection is enabled, it extends the selection to that row.

Grid Header Cells	• **Enter** if sorting is enabled, sort is applied. • **Alt** + **Arrow Down** opens the Column menu / Filter menu and moves the focus to that menu. • **Esc** closes Column menu / Filter menu. • **Ctrl** + **Space** group/ungroup the focused column. • **Ctrl** + **Left Arrow** reorders the column with the one on its left. • **Ctrl** + **Right Arrow** reorders the column with the one on its right.
Command Column Cells	• **Enter** moves the focus inside the command column. First button is focused. If a button is focused, it triggers the button action. • **Esc** if a button is focused, it returns focus to the command cell. • **Tab** moves the focus to the next button in the column. • **Shift** + **Tab** moves the focus to the previous button in the column.
Inline Edit Row	• **Tab** moves to the next editor in the row. • **Esc** cancels the row edit. The focus goes to the command cell from where the row edit was triggered.

In-cell Edit Cell	• **Tab** moves to the next editor in the row (closing current editor). It skips cells with Editable=false and command columns. If the focus is already on the last editable cell on the row, the focus is moved to the first editable cell on the next row, and it's editor is opened. If you are already on the last row of the grid, focus remains on the cell, with the editor closed. • **Shift** + **Tab** moves to the previous editor in the row (closing current editor). It skips cells with Editable=false and command columns. If the focus is already on the first editable cell on the row, the focus is moved to the last editable cell on the previous row, and it's editor is opened. If you are already on the first row of the grid, the focus remains on the cell, with the editor closed. • **Enter** commits changes for the edited item, and moves the focus to the same cell on the row below, opening it for edit. • **Esc** cancels the edit. The focus goes to the current cell.
Filter Row	• **Arrow Keys** moves to the next editor in the form. • **Enter** enters in the **td** and focuses the first focusable element in it. All filter row components gain tabindex=0. The focus remains trapped inside the filter row. • **Tab** goes through the filter row components. • **Esc** focus goes to the **td** element wrapping the currently focused filter component.

Column Menu	• **Alt** + **Arrow Down** when the header cell is focused, it opens the column menu. • **Arrow Down** focuses the next item in the column menu. • **Arrow Up** focuses the previous item in the column menu. • **Enter** activates the focused action in the column menu. • **Space** toggles a check box menu item (if focused). • **Esc** closes the column menu. If the focus is inside a drop-down menuor a filter, closes the drop-down menu.
Filter Menu	• **Alt** + **Arrow Down** when a header cell is focused, it opens the filter menu. • **Tab** focuses the next item in the filter menu. • **Shift** + **Tab** focuses the previous item in the filter menu. • **Esc** closes the filter menu. Note that if a popup inside the menu is currently opened, Escape will close it instead. Pressing Escape a second time will close the menu. • **Space** toggles a check box menu item (if focused).
Group Row	• **Enter** expands/collapses the row.
Detail Template Master Row	• **Enter** expands/collapses the row.

Checkbox Column	• **Space** toggle check box. Toggling the check box selects/deselects a row. • **Esc** returns the focus to the cell.

Pivot Grid Controls	
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.
Field List	• **Tab** moves to the next active UI element. • **Shift** + **Tab** moves to the previous UI element. • **Enter** selects or deselects a field in the All fields section. • **Down arrow** moves down in the filter selection section. • **Up arrow** moves up in the filter selection section. • **Space** selects or deselects a field in the All fields section.

Filter Dialog	• **Tab** moves forward through filters. Activates the OK and Cancel buttons. • **Shift** + **Tab** moves backwards through filters. Activates the OK and Cancel buttons. • **Down arrow** moves to the UI element below. • **Up arrow** moves to the UI element above. • **Enter** selects or deselects a filter. Activates the OK and Cancel buttons. • **Space** selects or deselects a filter. Activates the OK and Cancel buttons.
Drill-Through Dialog	• **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. • **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. • **Down arrow** moves the row/cell focus downward. • **Up arrow** moves the row/cell focus upward. • **Left arrow** moves the cell focus to the left side. • **Right arrow** moves the cell focus to the right side. • **End** moves to the bottom of the drill down section. • **Ctrl** + **Home** scrolls up. • **Ctrl** + **End** scrolls down.