



Modern Browser Experience Guide

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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. OneStream in 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

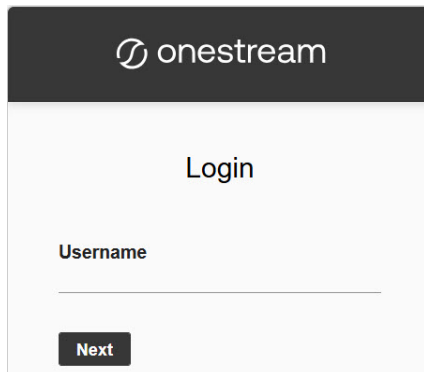
This section explores foundational capabilities and general features of the Modern Browser Experience, and highlights the notable differences between the browser and Windows application.

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.

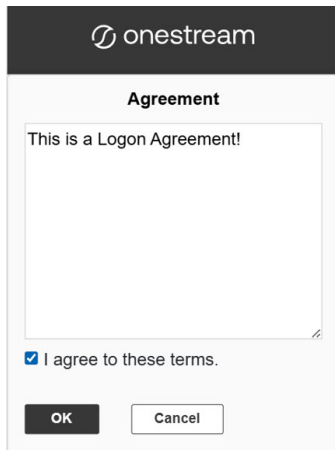
The browser environment can be accessed using a custom URL. For example, <https://cloudsitename.onestreamcloud.com>. Once the initial login screen has loaded, users can enter a username and click the Next button to authenticate through their Single Sign-On (SSO) provider.

The image shows a web-based login interface for OneStream. At the top, there is a dark header bar with the OneStream logo and name. Below this, the word "Login" is centered. Underneath, there is a label "Username" followed by a text input field. At the bottom left of the login area, there is a dark button labeled "Next".

Functional Capabilities

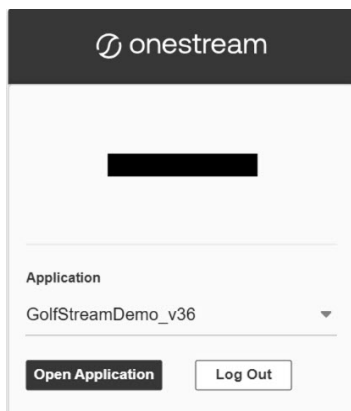
Following successful authentication, the user will either be:

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



The screenshot shows the Onestream Login Agreement page. At the top is the Onestream logo. Below it is the heading "Agreement". A text box contains the message "This is a Logon Agreement!". Below the text box is a checkbox labeled "I agree to these terms." which is checked. At the bottom are two buttons: "OK" and "Cancel".

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



The screenshot shows the Onestream Application Selection page. At the top is the Onestream logo. Below it is a black rectangular box. Below that is a horizontal line. Below the line is the heading "Application". Below the heading is a dropdown menu showing "GolfStreamDemo_v36". At the bottom are two buttons: "Open Application" and "Log Out".

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

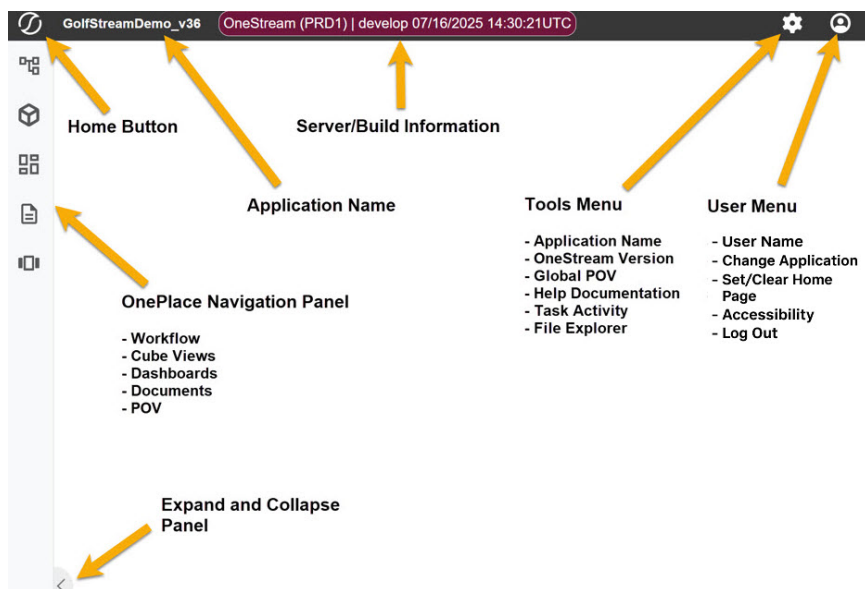
The Modern Browser Experience provides a familiar header area and updated OnePlace panel which can be accessed at any time while using the browser application. Similar to the Windows application, the header has a Home button embedded in the OneStream logo and displays the Application Name. Other header functionality has been moved to two menus in the top right corner of the screen.

Functional Capabilities

-  **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.

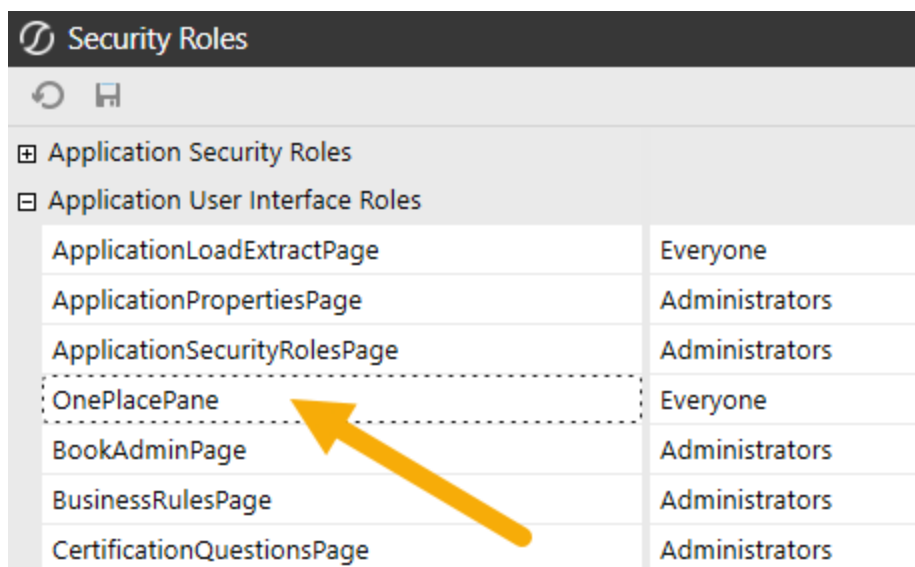
NOTE: The OnePlace panel may be fully hidden for certain users using security settings.



OnePlace Panel

Hide OnePlace Panel

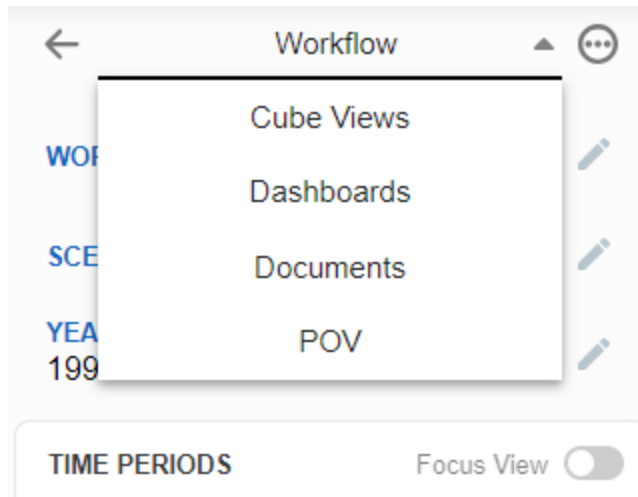
The OnePlacePane security role can be used to hide the Navigation panel. This configuration has been added under Security Roles to enable or disable end user access to the OnePlace navigation panel. Note that the Modern Browser Experience does not provide a user interface to facilitate configuring and applying security roles at this time.



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

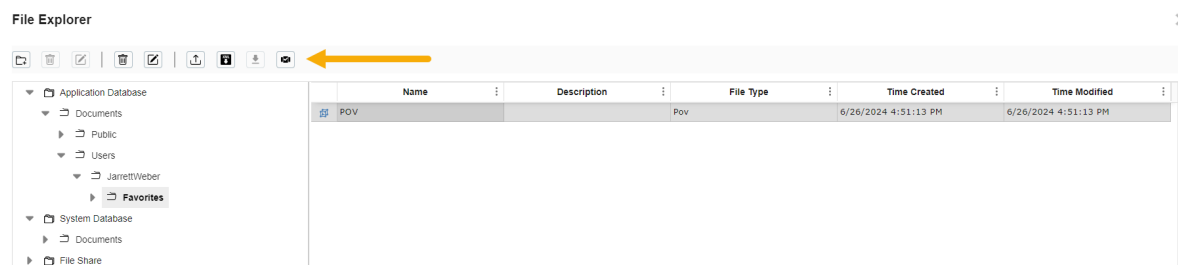
Navigate OnePlace Panel

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

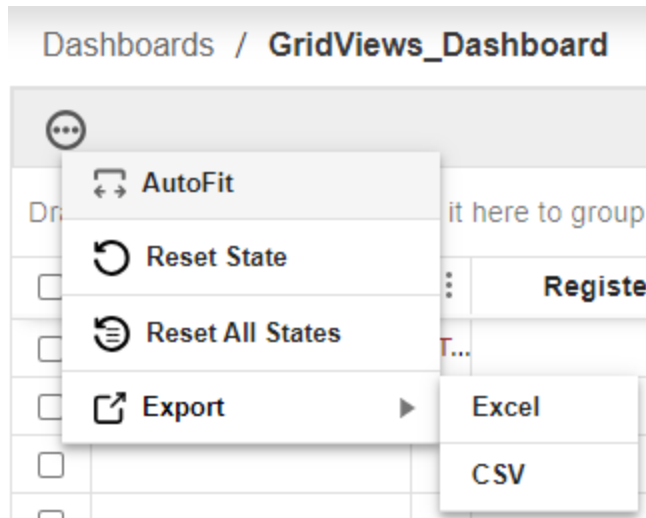
File Explorer is used to manage all OneStream files and saved POVs. The File Explorer dialog can be opened by selecting the File Explorer option from the Tools menu in the application header. File Explorer functionality is fully supported in the Modern Browser Experience and primarily located on the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

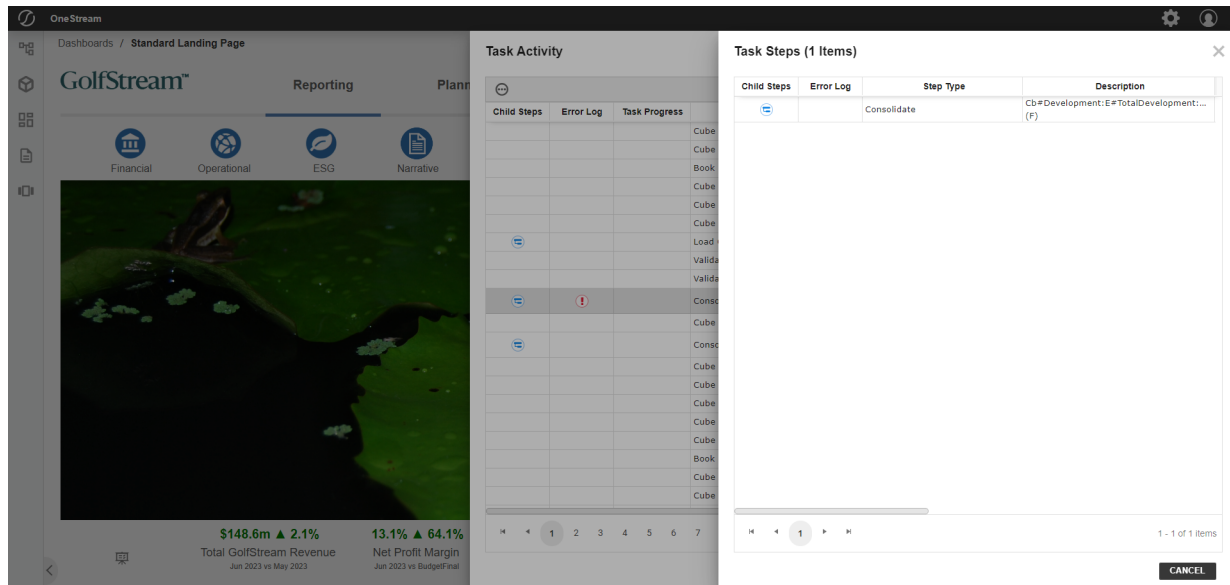
Amount		HoustonEntities	
86,400,000.0	↑	Sort Ascending	
28,704,154.5	↓	Sort Descending	
3,879,484.1	☰	Columns	▼
3,561,084.4	▼	Filter	▼
11,839,604.0	📄	Set column position	^
1,600.0	🔒	Lock	
3,200.0	🔓	Unlock	
1,050,481.8	◀	Move Previous	
3,740,384.4	▶	Move Next	
2,121,928.9			
-221,962.4			
2,546,879.1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



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.

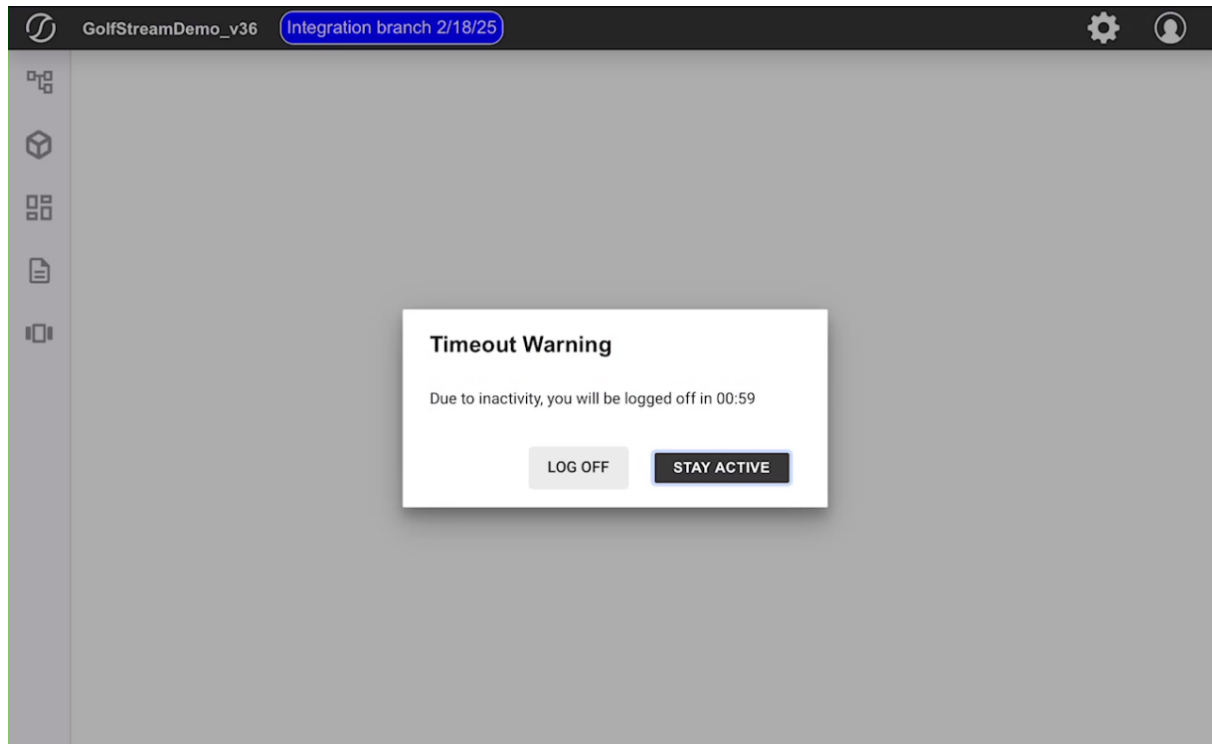
Functional Capabilities



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

Functional Capabilities

- 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

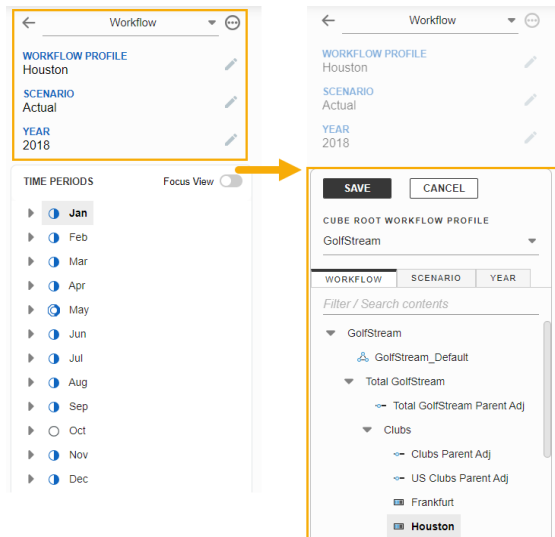
Workflow on the browser delivers the same functionality offered in the Windows Application with a few notable exceptions mentioned below. Some tactical user experience improvements have been made, while primarily focusing on delivering the functionality of the workflow steps.

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.

Workflow

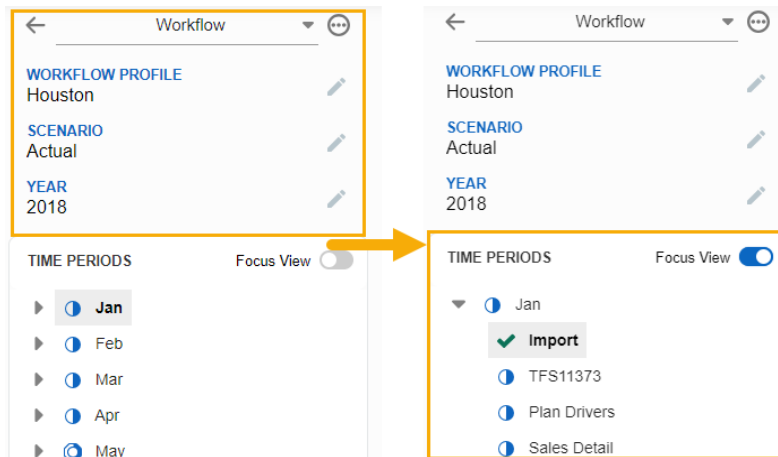


The screenshot shows a data table titled 'Target Intersections (Loaded)'. The table has columns for 'HoustonEntities', 'Time', 'View', 'HoustonAccounts', 'Flows', 'IC', 'CostCenters', and 'Ni'. The data is filtered for 'Houston / Actual / 2018 / Jan / Import'. The table contains 15 rows of data, all with 'Houston Heights' as the entity and '2018H1' as the time period. The 'View' column shows 'YTD' for all rows. The 'HoustonAccounts' column shows values ranging from 10100 to 12300. The 'Flows' column shows 'None' for all rows. The 'IC' column shows values like 'None', 'Carlsbad', 'Montreal', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None'. The 'CostCenters' column shows values like 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None', 'None'. The 'Ni' column shows values like 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni', 'Ni'.

HoustonEntities	Time	View	HoustonAccounts	Flows	IC	CostCenters	Ni
Houston Heights	2018H1	YTD	(Bypass)	None	None	None	Ni
ouston Heights	2018H1	YTD	10100	None	None	None	Ni
ouston Heights	2018H1	YTD	10300	None	None	None	Ni
ouston Heights	2018H1	YTD	10400	None	None	None	Ni
ouston Heights	2018H1	YTD	11000	None	None	None	Ni
ouston Heights	2018H1	YTD	11200	None	Carlsbad	None	Ni
ouston Heights	2018H1	YTD	11200	None	Montreal	None	Ni
ouston Heights	2018H1	YTD	11300	None	None	None	Ni
ouston Heights	2018H1	YTD	12000	None	None	None	Ni
ouston Heights	2018H1	YTD	12100	None	None	None	Ni
ouston Heights	2018H1	YTD	12200	None	None	None	Ni
ouston Heights	2018H1	YTD	12200	None	None	MatMgt	Ni
ouston Heights	2018H1	YTD	12200	None	None	None	Ni
ouston Heights	2018H1	YTD	12300	None	None	Admin	Ni
ouston Heights	2018H1	YTD	12300	None	None	Dist	Ni

- The new **Focus View** function allows users to view only the selected time period. In the example below, a user chose to view only June to simplify navigation. To return to the full list, simply disable the **Focus View** toggle.

Workflow

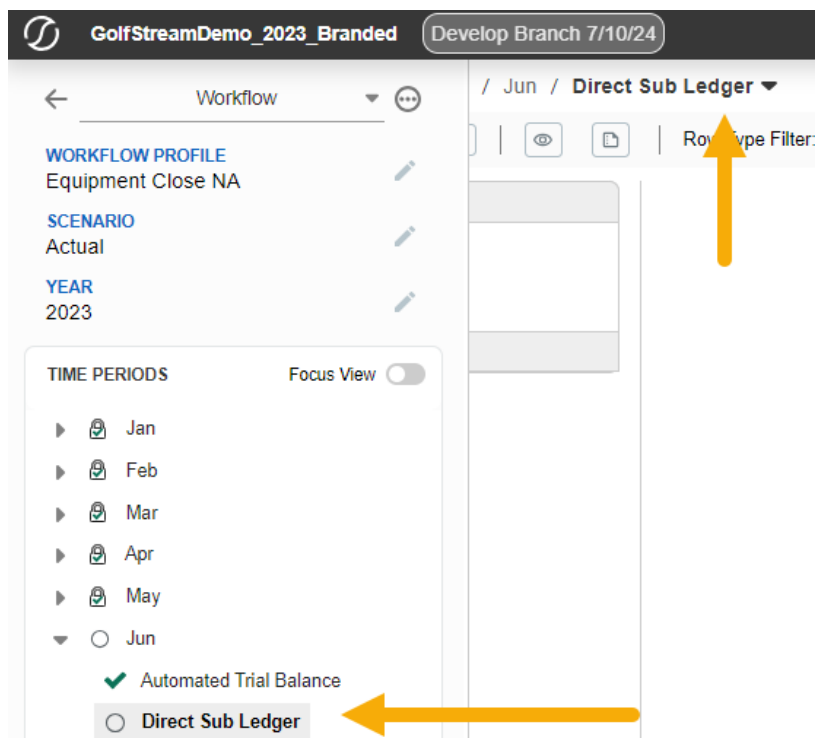
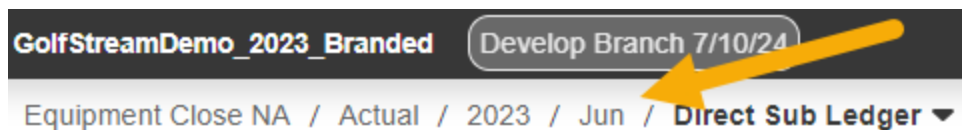


Status Icons have been updated, and in some cases, combined to make a more intuitive user experience.

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

Workflow Breadcrumbs

You can navigate to a specific month, time period, scenario, or workflow step of your choosing from the workflow navigation feature. Selecting an option will take you to the corresponding step. A new 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.

The screenshot displays the Journal Input page in the Modern Browser Experience. It features a left sidebar with 'Journal Templates (9)' and a 'Required' section for 'Tax Accruals'. The main area is divided into a top header for 'Tax Accruals_Houston_Journals_Actual_2023M1' (2), a main grid for 'JOURNALS' (3), and a 'JOURNAL DETAILS' section (5) below the grid. The grid shows a list of journals with columns for Name, Status, Entity, Description, and Journal Type. The details section shows a table of journal entries with columns for Cube, Entity, Parent, Account, UD2, UD3, Debit, Credit, and Description. The header section shows a table of journal settings with columns for Name, Status, Point of View, and Journal Settings.

- 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 dropdowns.
- 7 - Journal Header.

Workflow

- 8 - Journal Line Items.
- 9 - Paging on journal line items.
- Workflow Page Styling – Workflow Title, Workflow Steps, Grids, Status Area, and Analysis Area.

Amount	HoustonEntities	Time	View	HoustonAccounts	Flows	IC	CostCenters
86,400,000.00	Houston Heights	2018M1	YTD	(Bypass)	None	None	None
3,392,089.14	Houston Heights	2018M1	YTD	10100	None	None	None
3,870,484.16	Houston Heights	2018M1	YTD	10300	None	None	None
3,561,084.48	Houston Heights	2018M1	YTD	10400	None	None	None
11,839,604.09	Houston Heights	2018M1	YTD	11000	None	None	None
1,600.00	Houston Heights	2018M1	YTD	11200	None	Carlsbad	None
3,200.00	Houston Heights	2018M1	YTD	11200	None	Montreal	None

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

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

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

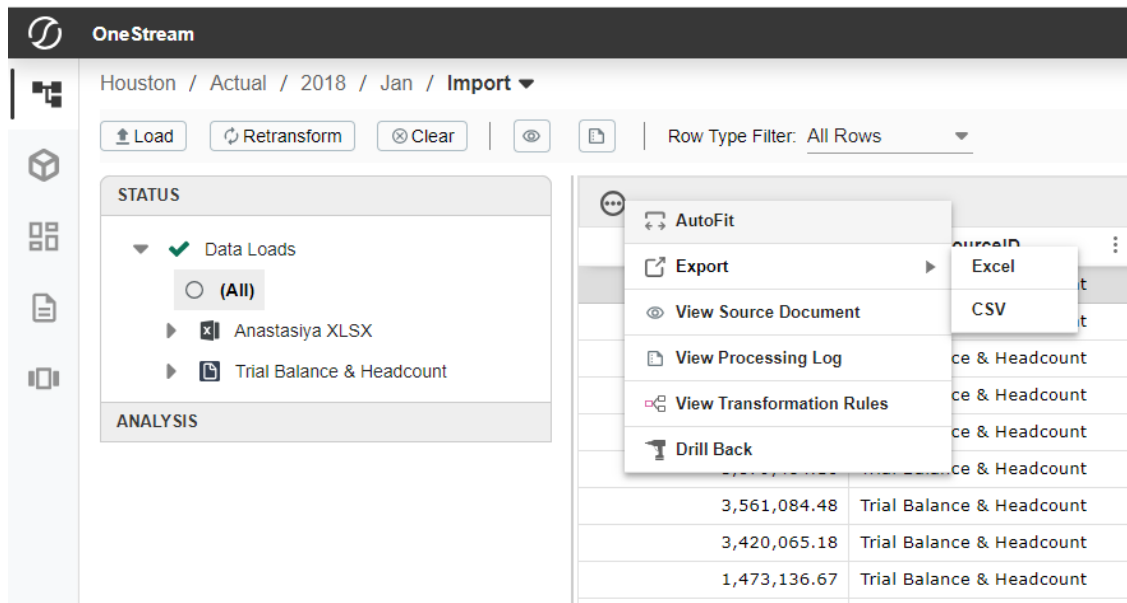
- Workflow Progress Buttons – Now displayed on the right side of the screen, the progress buttons have been updated with new icons and borders to improve visibility.

Status	Import	Validate	Load
Completed	✓	✓	✓

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

Workflow

- 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

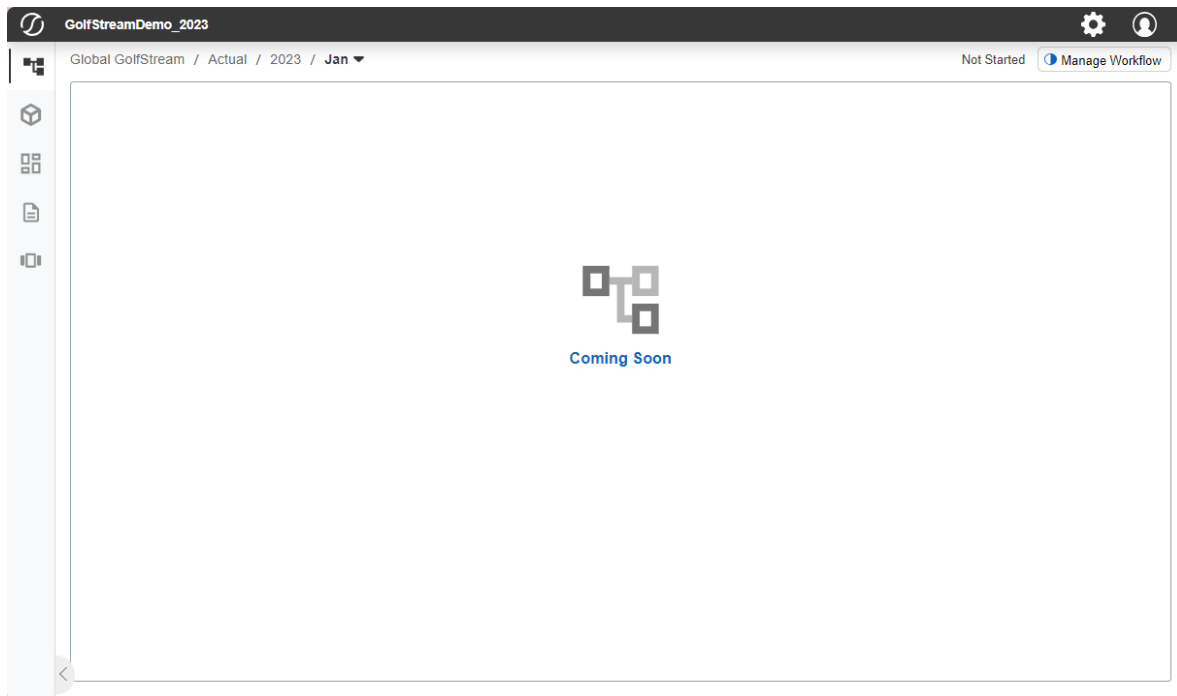
- Manage Workflow

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.

Cube Views

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.

The screenshot displays the 'Cube View Designer' interface, which is used to configure and preview cube views. The interface is divided into three main sections:

- Left Panel (Cube View):** Shows a tree view of the cube structure. The selected view is 'PPE Account Roll' for 'Local Jan 2018'. The tree includes categories like 'ComplexFlow', 'Activity', 'RollForward Activity', 'RollForward PPE Amort', 'Capital Spending', 'Capital Leases Acquired', 'Current Depr / Amort', 'ActivityCalc', 'FX', 'FX_Open', 'FX_Movements', 'FX_CurMvmt', 'FX_PrtMvmt', 'FX_Hist', 'Ending Balance', 'Ending Balance Calculated', and 'Historical Override Input'.
- Center Panel (Preview):** Displays a table with columns for 'Local Jan 2018' and 'Translated Jan 2018'. The table shows the following data:

	Local Jan 2018	Translated Jan 2018
ComplexFlow	14,243 EUR	17,448 USD
Beginning Balance Calc	7,086 EUR	8,601 USD
Activity	7,157 EUR	8,796 USD
RollForward Activity	7,157 EUR	8,796 USD
RollForward PPE Amort	7,157 EUR	8,796 USD
Capital Spending	6,257 EUR	7,600 USD
Capital Leases Acquired	9,994 EUR	12,282 USD
Current Depr / Amort	-9,093 EUR	-11,176 USD
ActivityCalc		
FX		50 USD
FX_Open		79 USD
FX_Movements		-29 USD
FX_CurMvmt		-29 USD
FX_PrtMvmt		
FX_Hist		0 USD
Ending Balance	14,243 EUR	17,448 USD
Ending Balance Calculated	14,243 EUR	17,448 USD
Ending Balance		
Historical Override Input		

- Right Panel (Configuration):** Contains settings for the cube view. The 'Definitions' section shows 'Default' and 'Col1'. The 'Rows and Columns' section shows 'Row1'. The 'Column' section shows 'Col1' with a dropdown menu. The 'Cube POV' section shows the following settings:

Member	Value
Cube	CashFlow
Entity Member	Madrid
Parent Member	Spain
Consolidation Member	
Scenario Member	Actual
Time Member	2018M1
View Member	

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.

Cube Views

- 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.

The screenshot displays the 'Cube View Designer' interface for a cube view named 'PPE Account Roll'. The main table shows financial data for 'Local Jan 2018' and 'Translated Jan 2018'. The 'Local' column values are: 14,243 EUR, 7,086 EUR, 7,157 EUR, 7,157 EUR, 7,157 EUR, 6,257 EUR, 9,994 EUR, 9,093 EUR, 14,243 EUR, 14,243 EUR, and Historical Override Input. The 'Translated' column values are: 17,448, 8,601, 8,796, 8,796, 8,796, 7,690, 12,282, 11,176, 17,448, 17,448, and Historical Override Input. The 'Save Cube View As' dialog is open, showing the 'Settings' tab. The 'Name' field is 'PPE Account Roll'. The 'Description' field is empty. The 'Group' dropdown is set to 'Financial Reports (CashFlow)'. The 'Group Properties' section shows 'General' properties: Name (Financial Reports (CashFlow)), Workspace (Default), Maintenance Unit (Default), and Description (CashFlow). The 'Security' section shows 'Access Group' (Everyone) and 'Maintenance Group' (Everyone). The 'Existing Cube Views' section lists 'Cash Account Roll'. The 'OK' and 'CANCEL' buttons are at the bottom right.

	Local Jan 2018	Translated Jan 2018
ComplexFlow	14,243 EUR	17,448
Beginning Balance Calc	7,086 EUR	8,601
Activity	7,157 EUR	8,796
RollForward Activity	7,157 EUR	8,796
RollForward PPE Amort	7,157 EUR	8,796
Capital_Spending	6,257 EUR	7,690
Capital Leases Acquired	9,994 EUR	12,282
Current Depr / Amort	9,093 EUR	11,176
ActivityCalc		
FX		50
FX_Open		79
FX_Movements		29
FX_CurMvmt		-29
FX_PrMvmt		
FX_Hist		0
Ending Balance	14,243 EUR	17,448
Ending Balance Calculated	14,243 EUR	17,448
Ending Balance		
Historical Override Input		

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.

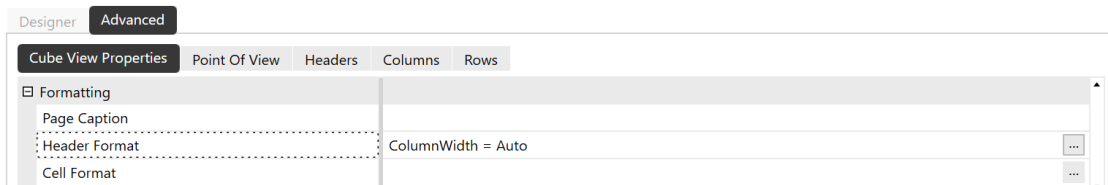
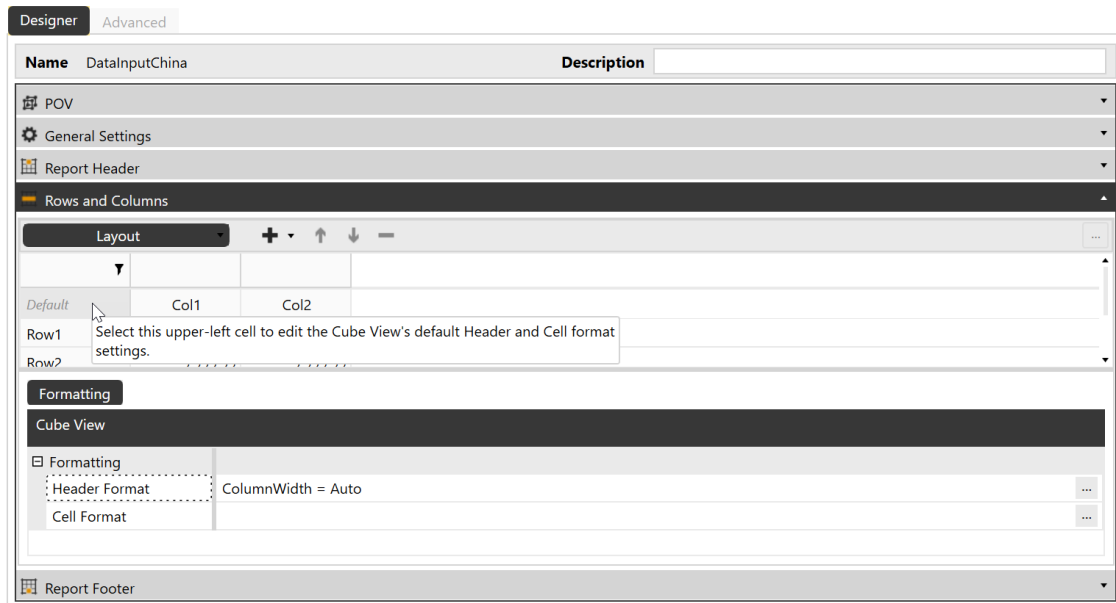
Cube View Designer

- 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.

Cube Views



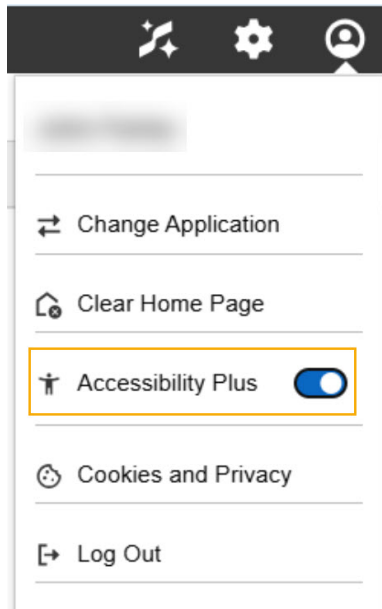
Unsupported Cube View Functionality

- 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.



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.

Dashboards

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

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

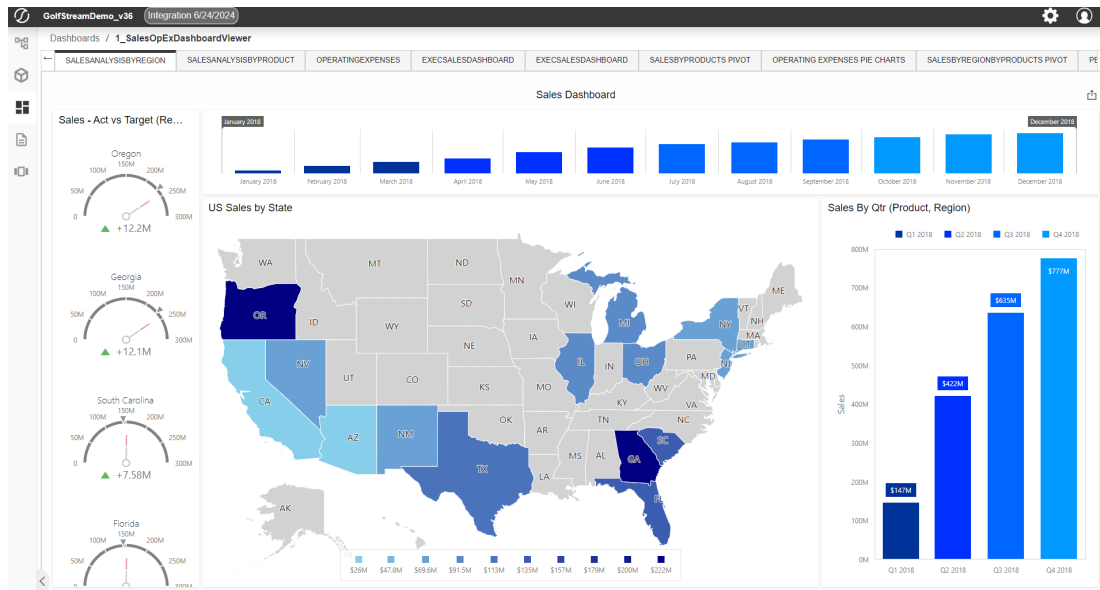
Preexisting and newly created dashboards will be set to the Windows application only by default. Dashboards are not initially visible. Dashboards always render in Workflows.

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.

Dashboards

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.

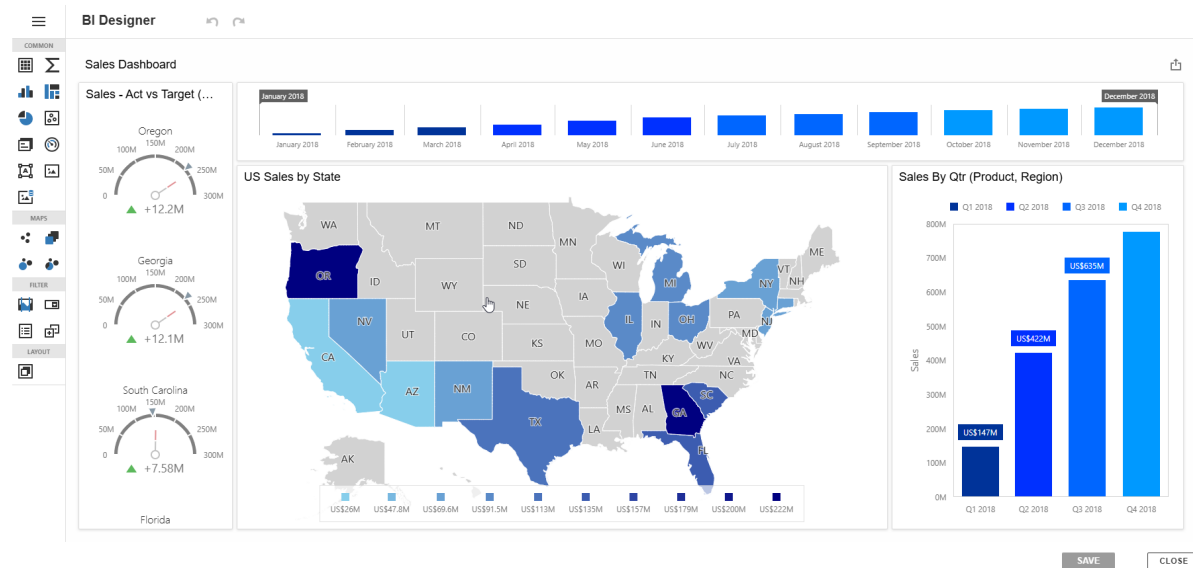
BI Viewer Designer

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.

Dashboards

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)

Dashboards

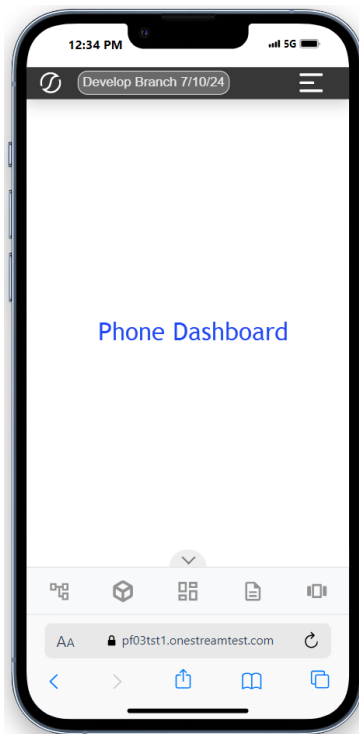
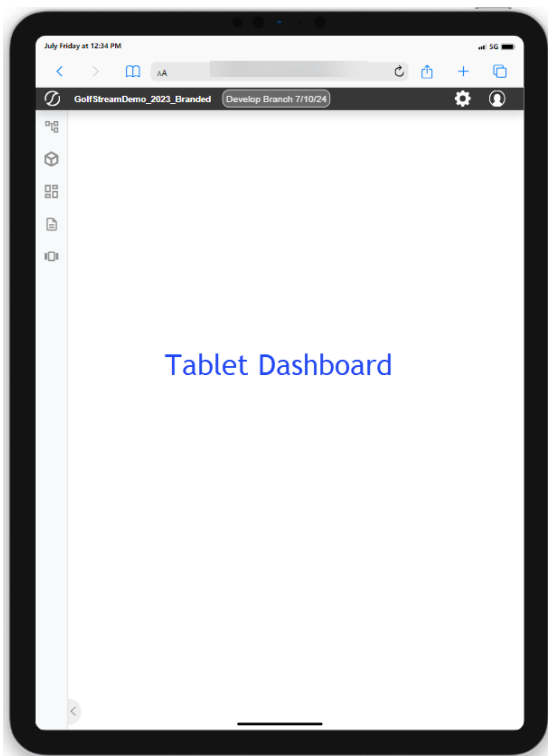
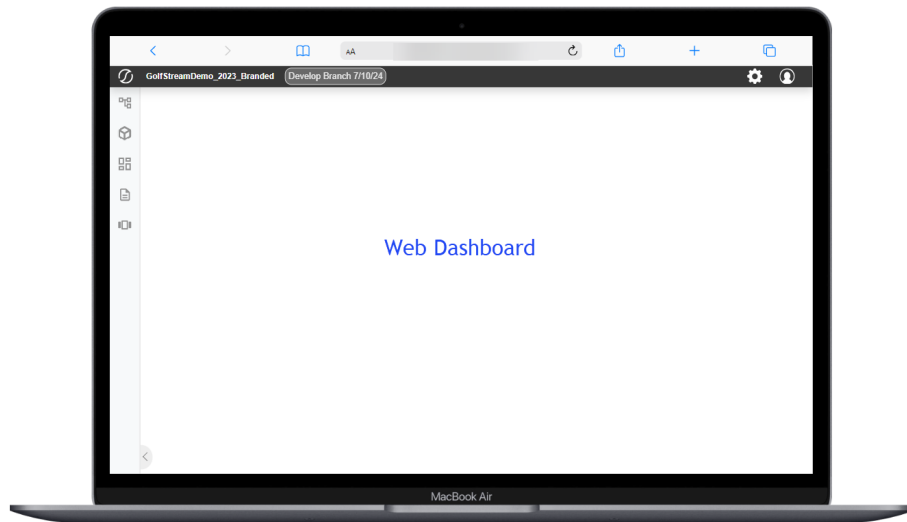
Component Properties

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



Windows Client Dashboard

Dashboards



Dashboards

	ClientModuleType	ClientXfVers	ClientIPAddress	PrimaryAppSer	LogonTime	LastActivityTime	LastTimeView	LogoffTime	LogonStatus	XmlData
☐	5001	8.0.0.15217	208.127.240.230	vmPRD1int000001	9/28/2023 11:31:0...	9/28/2023 11:31:1...	9/28/2023 11:31:0...	9/28/2023 1:32:16...	4	
☐	5001	8.0.0.15217	208.127.88.35	vmPRD1int000000	9/27/2023 2:23:34...	9/27/2023 2:23:38...	9/27/2023 2:23:34...	9/27/2023 4:23:44...	4	
☐	5001	8.0.0.15217	208.127.88.35	vmPRD1int000000	9/27/2023 2:20:31...	9/27/2023 2:20:31...	9/27/2023 2:20:31...	9/27/2023 4:23:19...	4	
☐	8dd5ca68-8745-4e...	5001	208.127.240.230	vmPRD1int000000	9/27/2023 7:52:48...	9/27/2023 7:52:55...	9/27/2023 7:52:48...	9/27/2023 7:59:24...	2	
☐	96ee2fcf-c25d-44e...	5001	208.127.88.37	vmPRD1int000001	10/26/2023 2:07:1...	10/26/2023 2:10:4...	10/26/2023 2:07:1...	10/26/2023 4:12:4...	4	
☐	079f4aaa-3b3d-49...	0	208.127.240.231	vmPRD1int000000	10/11/2023 3:07:3...	10/11/2023 3:14:4...	10/11/2023 3:07:3...	10/11/2023 5:14:4...	4	
☐	4a9cc837-1803-4e...	5001	208.127.240.231	vmPRD1int000000	10/11/2023 12:38...	10/11/2023 12:53...	10/11/2023 12:38...	10/11/2023 11:03...	4	
☐	546de750-d647-4a...	0	208.127.88.35	vmPRD1int000000	9/27/2023 2:28:54...	9/27/2023 3:48:03...	9/27/2023 2:28:54...	9/27/2023 5:48:20...	4	
☐	1d5d3f20-acac-41a...	5001	208.127.240.230	vmPRD1int000000	9/28/2023 12:37:5...	9/28/2023 1:28:59...	9/28/2023 12:37:5...	9/28/2023 3:29:00...	4	
☐	4d15d2aa-0203-47...	5001	208.127.240.231	vmPRD1int000000	10/12/2023 1:11:0...	10/12/2023 1:11:3...	10/12/2023 1:11:0...	10/12/2023 3:14:1...	4	
☐	b4d458c2-8728-4d...	5001	208.127.240.230	vmPRD1int000001	9/27/2023 6:12:54...	9/27/2023 6:13:00...	9/27/2023 6:12:54...	9/27/2023 8:13:21...	4	
☐	6b517ef9-bcaf-4d1...	0	208.127.88.35	vmPRD1int000001	9/27/2023 6:33:01...	9/27/2023 7:52:27...	9/27/2023 6:33:01...	9/27/2023 7:57:00...	2	
☐	b4c68667-e2ac-49...	5001	208.127.240.231	vmPRD1int000000	10/10/2023 6:30:1...	10/10/2023 6:30:1...	10/10/2023 6:30:1...	10/10/2023 8:31:4...	4	
☐	c5b09a7-8cbe-43...	0	208.127.88.35	vmPRD1int000000	9/27/2023 7:19:13...	9/27/2023 8:41:39...	9/27/2023 7:19:13...	9/27/2023 10:43:2...	4	
☐	f185cf04-baee-494...	5001	208.127.240.230	vmPRD1int000001	9/27/2023 7:45:03...	9/27/2023 7:45:11...	9/27/2023 7:45:03...	9/27/2023 9:48:21...	4	
☐	4a86c5d9-1198-41...	0	208.127.88.35	vmPRD1int000000	9/27/2023 2:18:14...	9/27/2023 2:18:35...	9/27/2023 2:18:14...	9/27/2023 2:23:11...	2	
☐	1d6953a2-1a0c-43...	0	208.127.88.35	vmPRD1int000001	9/27/2023 2:30:28...	9/27/2023 2:44:17...	9/27/2023 2:30:28...	9/27/2023 4:48:19...	4	
☐	9327af92-2ac4-47...	5001	208.127.240.231	vmPRD1int000001	10/10/2023 6:48:4...	10/10/2023 8:13:3...	10/10/2023 6:48:4...	10/10/2023 10:13...	4	
☐	fb5c5d6f-b4e4-467...	5001	208.127.240.230	vmPRD1int000000	9/27/2023 4:03:06...	9/27/2023 4:03:17...	9/27/2023 4:03:06...	9/27/2023 6:03:20...	4	
☐	b7a8e092-eca9-41...	5001	208.127.88.35	vmPRD1int000001	9/27/2023 2:20:51...	9/27/2023 2:20:56...	9/27/2023 2:20:51...	9/27/2023 4:23:19...	4	
☐	8b9a51b0-4862-48...	5001	208.127.88.35	vmPRD1int000000	8/29/2023 2:51:46...	8/29/2023 2:51:53...	8/29/2023 2:51:46...	8/29/2023 2:54:04...	2	
☐	37ae33ea-9da9-4e...	5001	208.127.240.230	vmPRD1int000000	9/28/2023 11:06:4...	9/28/2023 11:31:0...	9/28/2023 11:06:4...	9/28/2023 1:32:16...	4	
☐	094ee14c-95ae-46...	5001	208.127.240.231	vmPRD1int000000	10/26/2023 1:38:3...	10/26/2023 1:39:0...	10/26/2023 1:38:3...	10/26/2023 3:42:4...	4	
☐	8f689fd1-3269-46...	5001	208.127.240.230	vmPRD1int000001	9/27/2023 4:02:43...	9/27/2023 4:02:43...	9/27/2023 4:02:43...	9/27/2023 6:03:20...	4	
☐	06cf3874-c10c-498...	0	208.127.240.231	vmPRD1int000001	10/18/2023 12:02...	10/18/2023 12:02...	10/18/2023 12:02...	10/18/2023 12:02...	2	
☐	c8921742-4861-48...	5001	208.127.88.37	vmPRD1int000001	10/5/2023 12:06:4...	10/5/2023 12:07:0...	10/5/2023 12:06:4...	10/5/2023 2:09:54...	4	

☐	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	walter	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.

Pivot Grid 1 Description

Total Rows : 133

View Chart Show Field Chooser Export

Field Chooser

All Fields

- ☐ Account
- ☒ Amount
- ☐ Calc Script
- ☐ Cons
- ☐ Cube
- ☐ Entity

Filter Fields

Row Fields

UD2

Column Fields

Time

Data Fields

Amount

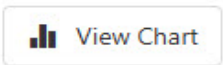
2017M12 - Dec 2017	2018M1 - Jan 2018	2018M2 - Feb 2018	2018M3 - Mar 2018	2018M4 - Apr 2018	2018M5 - May 2018
55,139.32	291,846,106.25	4,329,787.56	4,053,458,708,433,878.50	1,162,594,021.75	2,487,32
67,057.60	185,456,912.89	2,751,412.53	2,575,816,230,722,916.50	738,783,535.56	1,580,59
68,548.24	185,456,912.89	2,751,412.53	2,575,816,221,734,096.00	738,783,535.56	1,580,59
98,509.36	0.00	0.00	8,988,820.22	0.00	
88,081.72	106,389,193.36	1,578,375.03	1,477,642,477,710,962.20	423,810,486.19	906,72
19,553.97	0.00	0.00	8,396,654.76	0.00	
68,527.75	106,389,193.36	1,578,375.03	1,477,642,469,314,307.50	423,810,486.19	906,72
65,417.95	875,538,318.76	12,989,362.68	12,160,376,125,301,636.00	3,487,782,065.26	7,461,97

OK Cancel

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 .xlsx 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, OneStream functions 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.

The screenshot displays the OneStream Task Manager interface. At the top, there's a header with 'OneStream' and a user profile icon. Below it, a navigation bar shows 'Dashboards / Task Manager'. A filter bar includes 'Time' (2018M1), 'Role' (Administrator), and several category filters. A summary bar on the right shows statistics: Total 30, % Done 3%, Not Started 26, Prepared 2, Past Due 35, In Process 15, Rejected 0, Fully Approved 1, and a Refresh button. The main area is a table with columns: State, State Text, Approval Level, Task Group, Task, Description, Action Type, Priority, Work Day, and Start Date. The table lists various tasks like 'Account Reconcili...', 'Bank Statement...', 'Cash Plan', 'Cashflow Mainten...', 'Certify Results for...', 'Close AP Sub-ledg...', 'Close AR Sub-ledg...', 'Close GL', and 'Detailed Capex Pl...'. A modal is open at the bottom, titled 'Task: Bank Statement Download', showing the URL 'https://www.accountmanagement.baml.com/login/login.aspx' and a button labeled 'Open in New Tab'.

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.

Dashboards

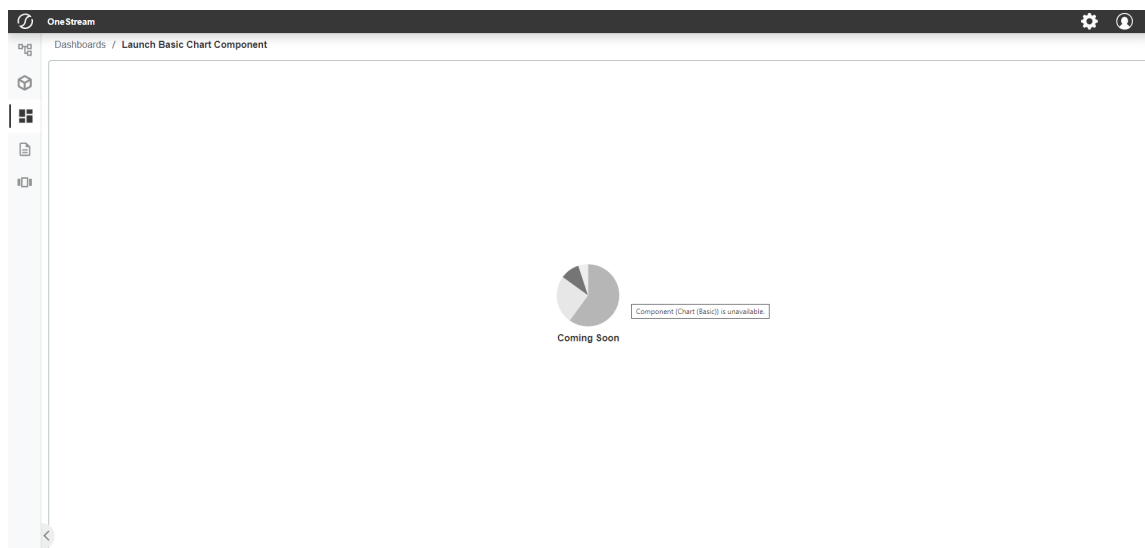
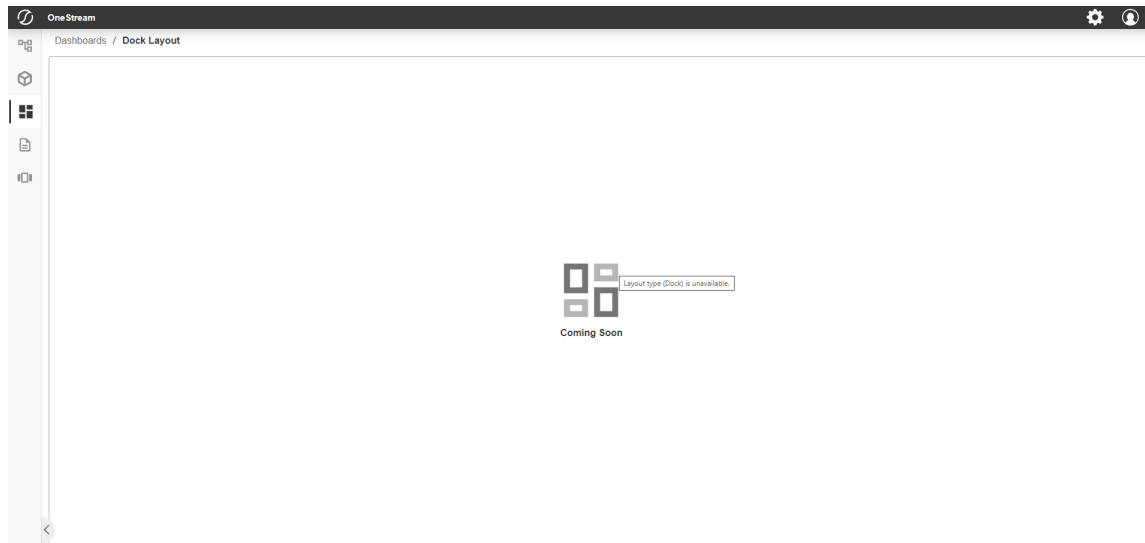
Dashboard Properties

Dashboard Components

General (Dashboard)	
Name	Cube Views_1
Workspace	IreneTestingWS
Maintenance Unit	IreneTesting
Dashboard Group	Cube Views
Description	
Page Caption	
Notes	
Behavior	
Dashboard Type	(Use Default)
Custom Control	
Required Input Parameters	
Processing	
Literal Parameter Values (e.g., Param1=Value1, ...)	
Template Parameter Values (e.g., Param1=Value1, ...)	
Component Template Repeat Items	(Collection)
Text 1	
Text 2	
Formatting	
Layout Type	Uniform
Is Initially Visible If Embedded	Canvas (Windows App Only)
Display Format	Dock (Windows App Only)
Show Title	Grid
Action (Primary Dashboard Only)	Horizontal Stack Panel
Server Task	Tabs
Load Dashboard Server Task	Uniform
Load Dashboard Server Task Arguments	Vertical Stack Panel
	Wrap (Windows App Only)

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

Dashboards



Even if all dashboard layouts and components are supported, we still recommend conducting a full regression test of any dashboard that is being transferred from the Windows 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:

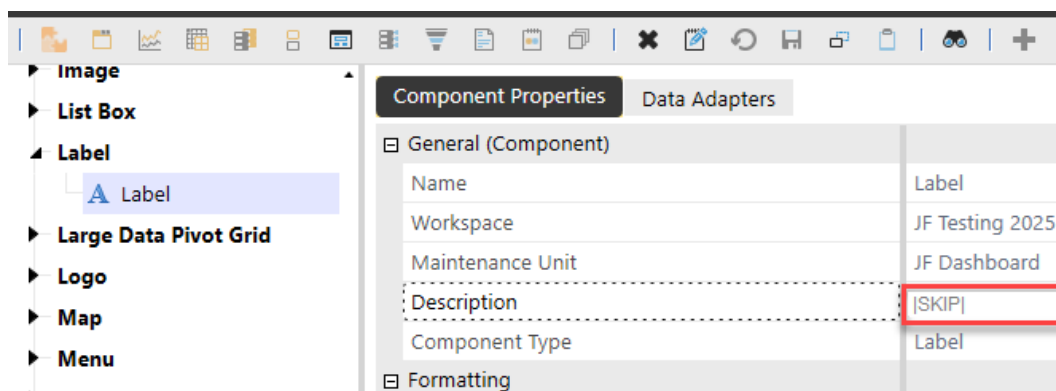
- Advanced Charts
- BI Viewer
- Filter Editor

Dashboards

- 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

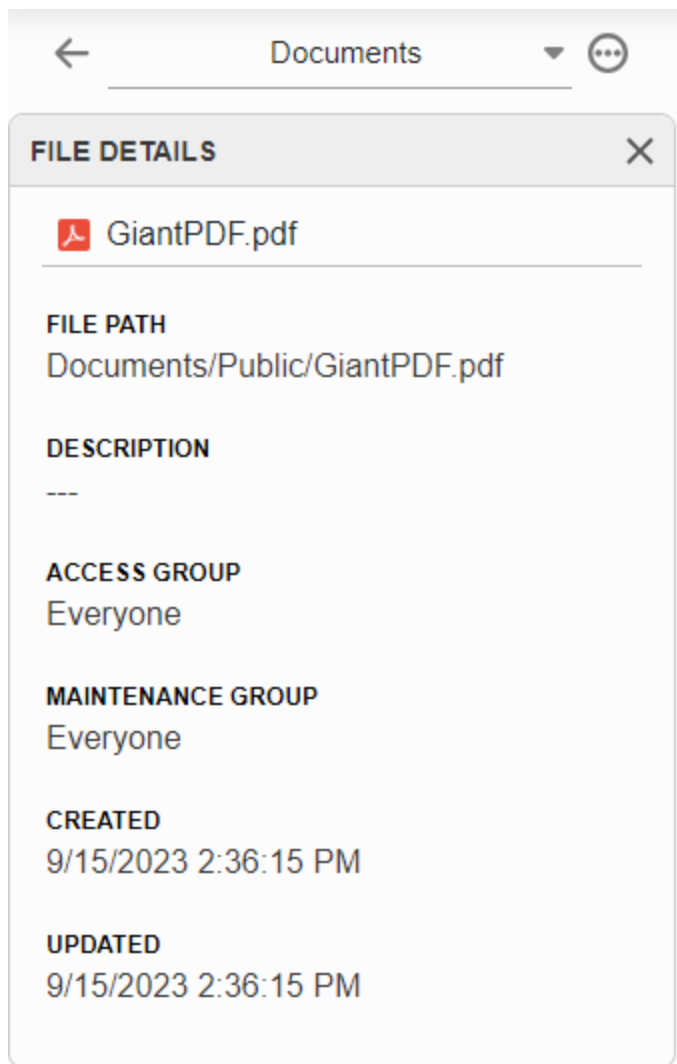
This approach uses a single adaptive dashboard. Designers need an initial understanding of how their dashboard should adapt to each client or device type intended for use. The designer creates Embedded Dashboards with configurations that link to client/device specific dashboards. The Embedded Dashboards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

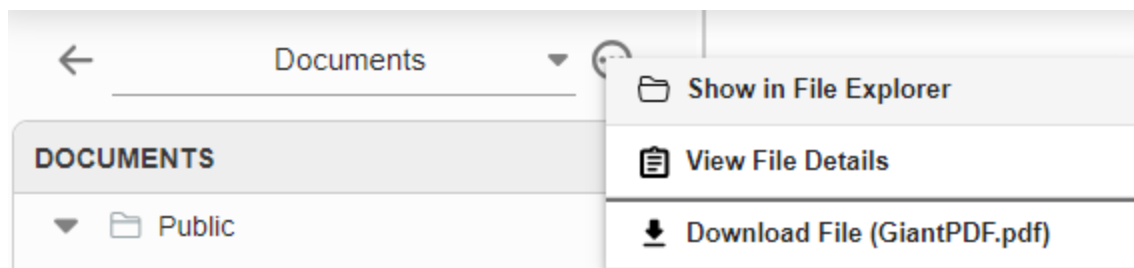
Documents

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.

Documents



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



Documents

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

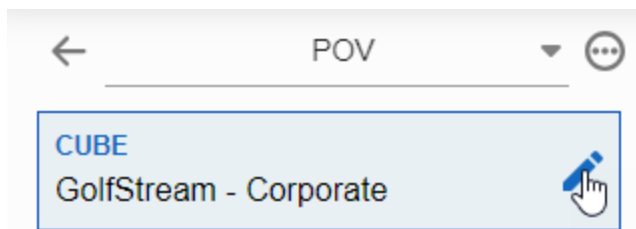
The POV panel can be accessed from the OnePlace toolbar and can be used to view and modify the current Cube POV. Similar to Workflow POV, the Cube POV menu is presented as an overlay instead of a floating dialog. Notably, information from the Windows Platform POV menu is displayed in a two different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

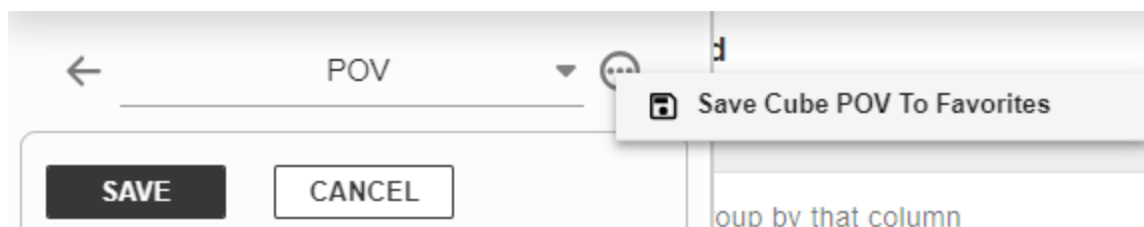


POV

A screenshot of a mobile application interface for configuring a Point of View (POV). At the top, there is a header bar with a back arrow, the title "POV", and a menu icon. Below the header, there are two buttons: "SAVE" and "CANCEL". The main content area is divided into two sections. The first section is labeled "CUBE" and contains a dropdown menu with the selected value "GolfStream - Corporate". The second section is labeled "DIMENSION" and contains a dropdown menu with the selected value "Entity - CorpEntities". Below these sections, there are two tabs: "HIERARCHY" and "SEARCH". The "HIERARCHY" tab is currently selected, showing a tree view of the hierarchy. The tree starts with "None" (indicated by a blue cube icon), followed by "All Orgs", "Total GolfStream", and "Clubs". Each item in the tree has a small downward arrow next to it, indicating it is a dropdown menu.

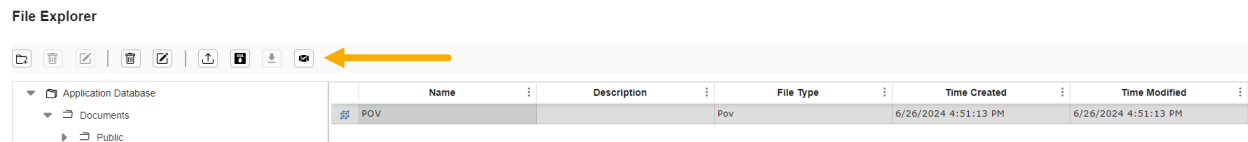
Save a POV

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 ▪ XFCGetCell, XFCGetCell5, XFCGetFXRate, XFCGetCalculatedFxRate, XFCGetMemberProperty, XFCGetRelationshipProperty, XFCGetHierarchyProperty, XFCGetMemberInfo XFCSetCell , XFCSetFXRate ▪ Refresh data and submit changes (XFCSetCell 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
--------	---

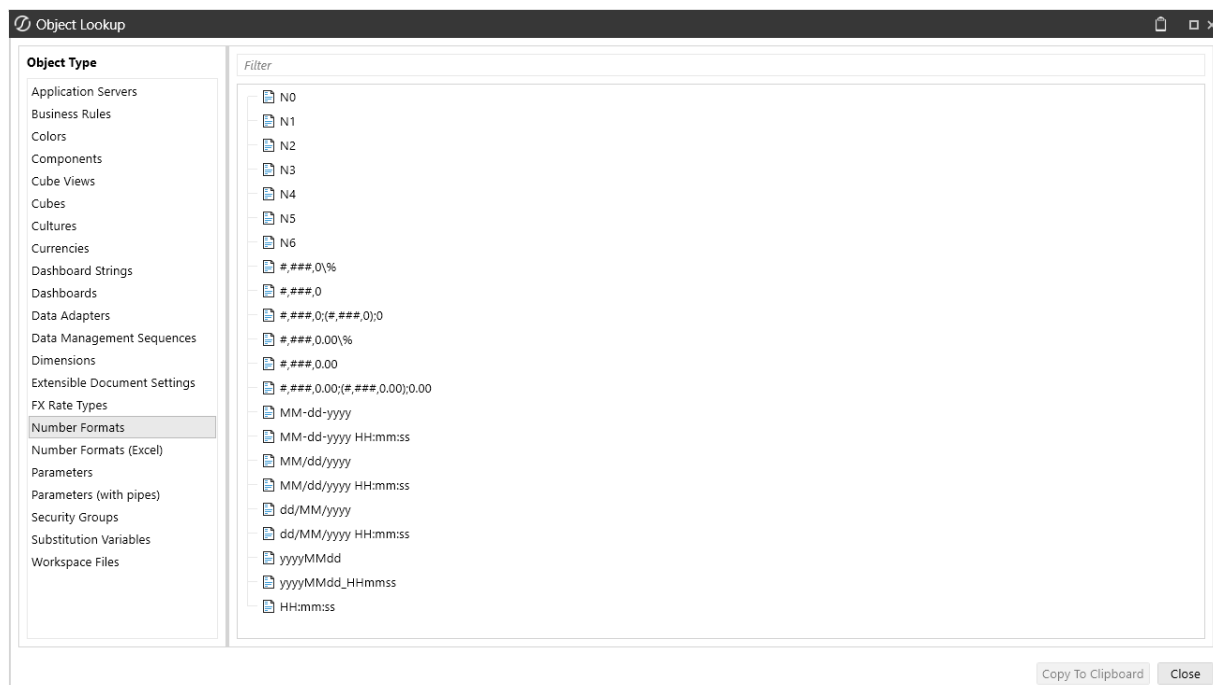
Appendix B: Spreadsheet Features and Functionality

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");
}
```

Appendix D: Smart Link APIs

```
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;
```

Appendix D: Smart Link APIs

```
        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

Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard Controls

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).

Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard Controls

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 the focusable 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.

Appendix E: Component Keyboard Controls

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

Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard 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.

Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard Controls

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.
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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.
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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.
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Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard Controls

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.

Appendix E: Component Keyboard Controls

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 menu or 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.

Appendix E: Component Keyboard Controls

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

Appendix E: Component Keyboard Controls

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.