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Redwood
Design
System

Overview

Data Authoring Page Template

rj-sp-data-authoring-page

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Usage

This component is used to:

- Analyze and work on large data sets
- Provide layout authoring capabilities to the end user
- Create and manage new pages of data from the same workbook
- Run, save, or submit data sets

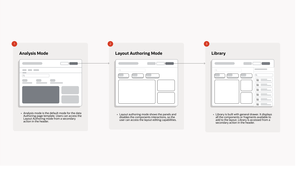
Additional specs:
View these component specs on the ROC:

Page Header - General Overview | Information Organizer | Scoreboard | General Drawer | Configuration Drawer | Smart Search | Dashboard Landing Page Template

Modes

Data Authoring has 2 modes. Each mode allows users to perform different actions.

Flow



Overview

Data Authoring page template allows users to explore and edit data as well as modify the layout of their page by adding, removing, and reordering the components.

The page template supports 2 modes:

- Analysis Mode - To work on data
- Layout Authoring Mode - To edit the components and the layout.

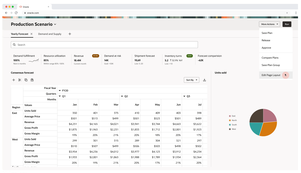
The ensuing screens illustrate the 2 modes and the layout authoring and Layout Authoring modes.

Modes

Analysis mode
The user can work on all the active components on the page, create new pages and run actions.

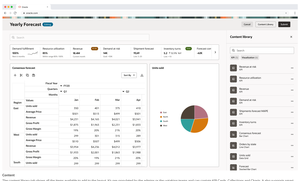
Layout Authoring mode
The user can edit the page layout, add properties, rearrange the layout and remove panels. In this mode, the user can add and remove components on the page is disabled and the panels are delineated by a white background and get the marquee on hover to allow for the drag and drop capabilities.

Accessing Layout Authoring Mode



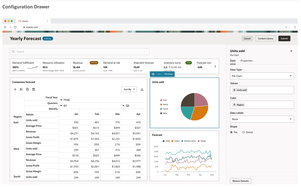
Edit Page Layout
Edit Page Layout is a secondary action on the header. It launches the Layout Authoring mode on the user's current page and removes the information organizer. Only 1 page can be edited at the time.

Library



Content
The content library tab shows all the items available to add to the layout. It's pre populated by the admins or the updating teams and can contain KPI Cards, Collections and Charts. It also supports smart search to filter the contents of the library.

Configuration Drawer



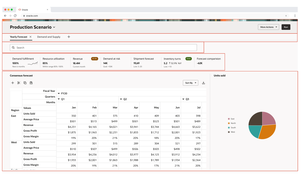
Configuration Drawer
The Configuration Drawer shows all the possible edits that the user can make to the selected panel and allows them to reset to default as well. To see the specifications for each type of content, see Data and Visualization Drawer Spec.

Component mapping

Note:
View the specs and devices of these components on the ROC (https://redwood.oracle.com/components)

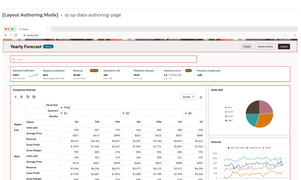
Switching modes
Switching between modes, we drill into the selected page that the user is editing. The information organizer is replaced with a secondary action header to create and edit header, updating the name of the page that is being edited.

[Analysis Mode] - rj-sp-data-authoring-page

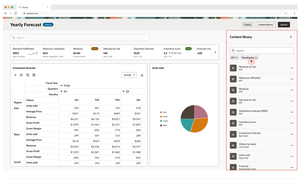


Page Element	Component	Configurations
1. General overview header	rj-sp-header-general-overview	Contains content switcher, primary action and secondary action menu.
2. Information organizer	rj-sp-information-organizer	The information organizer includes tabs and an icon button (Add).
3. Smart Search	rj-sp-smart-search	The only configuration for the Smart Search release is horizontal layout. Can also include suggested chip which sits outside of the search bar.
4. Scoreboard	rj-sp-scoreboard	Read only content, the content is only displayed and not to be interacted with.
5. Dashboard Grid Layout	rj-sp-dashboard-landing-page	Data authoring page template supports Hero, Above fold and Collection Layouts.

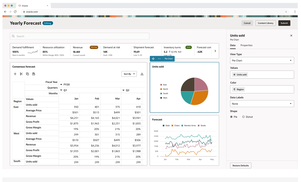
[Layout Authoring Mode] - rj-sp-data-authoring-page



Page Element	Component	Configurations
1. Create and edit header	rj-sp-header-create-edit	Contains the actions to submit, open the content library and cancel.
2. Smart Search	rj-sp-smart-search	The only configuration for the Smart Search is a horizontal layout. On this mode, smart search shows as disabled.
5. Scoreboard	rj-sp-scoreboard	Read only content, the content is only displayed and not to be interacted with. The visual configuration for the panel changes and each scoreard supports the Layout Editor marquee.
6. Dashboard Grid Layout	rj-sp-dashboard-landing-page	Data authoring page template supports Hero, Above fold and Collection Layouts. The visual configuration for the panels changes and each panel supports the Layout Editor marquee.



Page Element	Component	Configurations
5. General Drawer	rj-sp-general-drawer-template	Contains the content library, see content library page for detailed anatomy.



Page Element	Component	Configurations
6. Configuration Drawer	rj-sp-configuration-drawer-template	Updates the Configuration drawer for Data and visualization configurations.

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Usage, Types, Anatomy

Data authoring page template - Analysis Mode

oj-sp-data-authoring-page POR

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Usage

On Analysis Mode the user is able to:

- Analyze and work on large data sets.
- Create and manage new pages of data from the same plan.
- Run, save, or submit work plans.

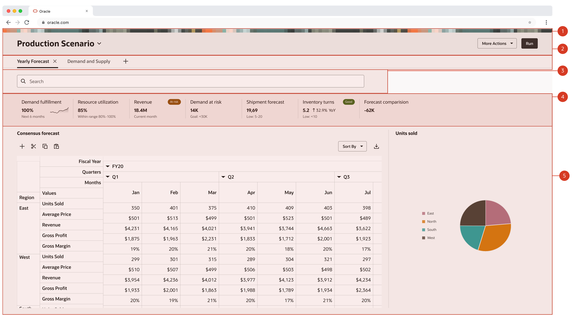
Additional specs:

View these component specs on the ROC.

Page Header - General Overview | Information Organizer | Scoreboard | General Drawer | Configuration Drawer | Smart Search | Dashboard Landing Page Template

Anatomy

Desktop



1. Page Header - General Overview
Required and composed of an Object Switcher, Actions and Redwood color strip. It may optionally include timestamp.

2. Information Organizer
Required. It allows the creation and opening of pages from distinct but closely related information in a group allowing one level of navigation.

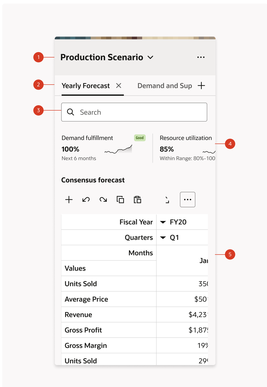
3. Smart Search
Required. The Smart Search component is a search input text with advanced filtering capabilities. It appears at the page level, applying to all the page content. Smart Search may optionally include Suggestion Chips.

4. Scoreboard
Optional and read-only, the scoreboard part of the Dashboard Grid Layout. Contains up to 10 Key Performance Indicators with status and can be edited by the end user in the Layout Authoring mode.

5. Dashboard Grid Layout
Required. The dashboard layout consists of a set of panels containing your reader's business data. The primary view can be visualization-driven (charts, map) or collection-driven (table, data grid.) Multiple layouts are available to satisfy your reader's information needs. See Layout types in the Dashboard Landing Page Template for more information.

The dashboard grid layout can be edited by the end user in the Layout Authoring mode.

Phone



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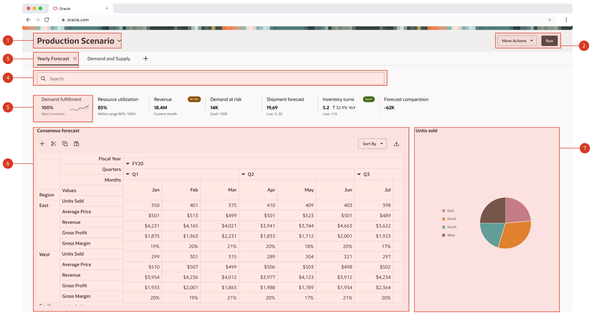
The dashboard grid layout can be edited by the end user in the Layout Authoring mode.

Focus Order and Targets

Component focus behavior

All the individual components follow their established focus behavior. For more information, see the individual component specs on the ROC (https://redwood.oracle.com/components).

Desktop



1. Context Switcher

2. Page-level Actions

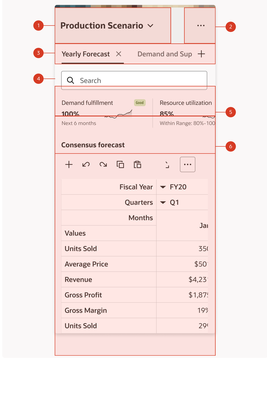
3. Information Organizer
The first tab recieves the focus The tab is a click target; clicking the tab displays the content. To get access to the next tab use arrows keys

4. Smart Search
Shown at the page-level under Information Organizer. When Smart Search is active, it receives keyboard tab focus.

5. Scoreboard
First tab order puts focus on the entire scoreboard container. Second tab order puts focus on the first content of the scoreboard container.

6-7. Dasboard Panels
Each Panel in a Dashboard Grid receives keyboard tab focus, starting with the primary panel and moving to secondary panels, start to end, top to bottom.

Phone



1. Context Switcher

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The first tab receives the focus. The tab is a click target; clicking the tab displays the content. To get access to the next tab, use arrows keys

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Usage, Types, Anatomy

Data authoring page template - Layout Authoring Mode

oj-sp-data-authoring-page PRE

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Usage

In Layout Authoring mode, the user is able to:

- Add, move, and remove KPIs, collections, and visualizations.
- Edit the properties of KPIs, collections, and visualizations.

Additional specs:

View these component specs on the RDC:

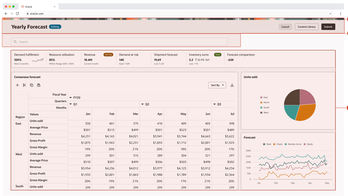
Page Header - General Overview | Information Organizer | Scoreboard | General Drawer | Configuration Drawer | Smart Search | Dashboard Landing Page Template

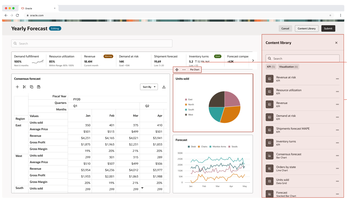
Anatomy

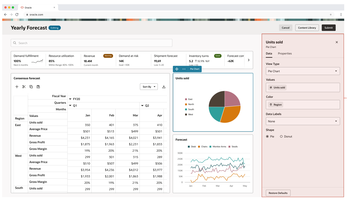
Disabled Interaction

In Layout Authoring mode, the interactive capabilities of the dashboard components themselves are disabled. The user can only interact with them at a panel level, to move them around or configure them.

Desktop







1. Page Header - Create and Edit
Required. Composed of Title, Redwood color strip, and a badge that signals the authoring mode. It also includes action buttons to cancel, submit, and open the content library.

2. Smart Search
On edit mode, the Smart search shows as disabled.

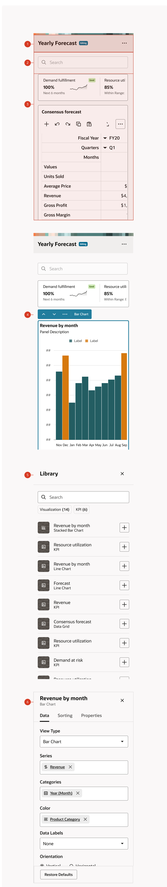
3. Dashboard Grid Layout
On Edit mode, the dashboard grid remains with the same composition. A white background is added and the dividers are removed. Each panel and scorecard also get a marquee on hover.

4. Selection Marquee
Required and composed of Drag handle, Menu Button and Label. It allows the user to perform actions on the panels.

5. Library
Required. It uses the General Drawer Template. To see the detailed configuration, see the Library section on this spec.

6. Configuration Drawer for data and visualizations
Required. It performs live changes on the layout. It's triggered by the properties option on the marquee or by clicking on a panel or kpi.

Phone



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Required. Composed of Title, Redwood color strip and a badge that signals the authoring mode. It also includes action buttons to cancel, submit and open the content library.

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On Edit mode, the dashboard grid remains with the same composition. A white background is added and the dividers are removed. Each panel and scorecard also get a marquee on hover.

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Required. It uses the General Drawer Template. To see the detailed configuration, see the Library section on this spec.

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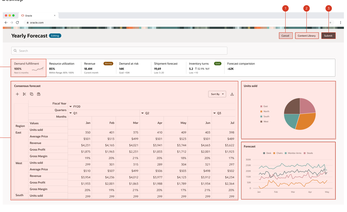
Required. It performs live changes on the layout. It's triggered by the properties option on the marquee or by clicking on a panel or kpi.

Focus Order and Targets

Focus state

For Keyboard use, when the focus is on a panel, the focus marquee is displayed in the focus state to allow the user easier access to the actions they can perform.

Desktop



1. Cancel action button

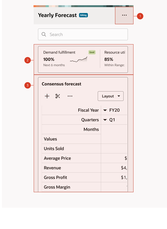
2. Library
When activated, the Library drawer opens and the focus moves to the first actionable element in the drawer.

3. Submit action button

4. Scoreboard
The focus goes into the first KPI. To move between cards, use the right and left arrows.

5.1 Dashboard panels

Phone



1. Overflow Menu
The overflow menu contains actions for Cancel, submit, and accessing the content library. When activated, the Library drawer opens and the focus moves to the first actionable element in the drawer.

2. Scoreboard
The focus goes into the first KPI. To move between cards, use the right and left arrows.

3. Dashboard panels

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Usage, Types, Anatomy

Data authoring page template - Library

oj-sp-data-authoring-page CR4

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Library

Usage

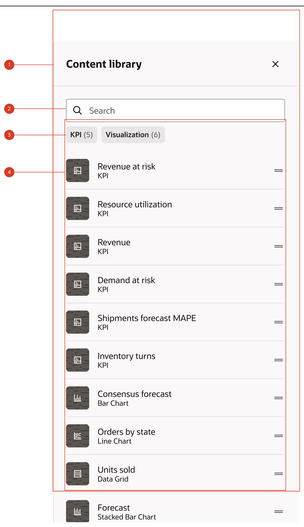
The Library shows all the items available to add to the layout. It's pre-populated by the admins or the uptaking teams and can contain KPI Cards, Collections, and Charts. It also supports smart search to filter the contents of the library.

Additional specs:

View these component specs on the ROC.

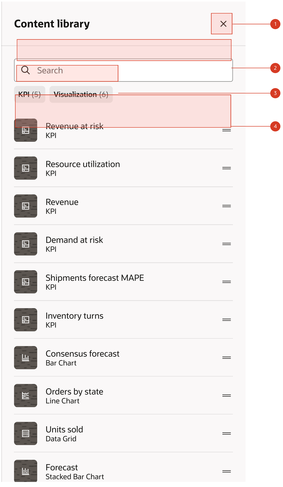
Page Header - General Overview | Information Organizer | Scoreboard | General Drawer | Configuration Drawer | Smart Search | Dashboard Landing Page Template

Component Mapping



Page Element	Label	Component	Configurations
1. General Drawer Template	Library	oj-sp-general-drawer-template	• Inline layout drawer • End position • Title and close button are required.
2. Smart Search	N/A	oj-sp-smart-search	• Horizontal layout • SM Breakpoint
3. Suggestion chips	Custom	oj-sp-smart-search	• Toggle suggestion chip • SM Breakpoint
4. List View	Title + Type	oj-c-list-view	• Leading by image, the visual includes an icon that represents the type. • Primary text with title of the panel. • Secondary text with the panel type. • Drag affordance activated.

Focus Order and Targets



1. Close Button

2. Smart Search

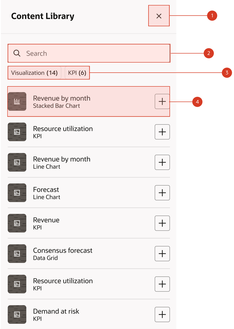
3. Suggestion Chip

4. List View

Types

Library

- On mobile, the content library is adaptive. The user will see add buttons instead of drag + drop. Clicking on the add button automatically adds the visualization or KPI to the top of the list and closes the drawer.



1. Close Button

2. Smart Search

3. Suggestion Chip

4. List View

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Behavior

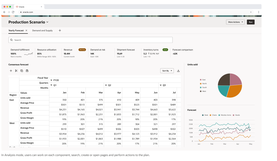
Data Authoring Page Template

ID: sp-data-authoring-page

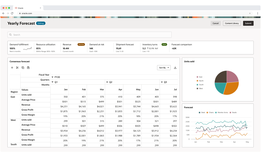
The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Page States

Enabled

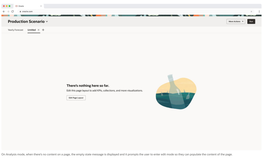


In Analysis mode, users can work on each component, search, create or open pages and perform actions to the plan.



In Layout Authoring mode, users can add, move, remove, and edit panels.

Empty State

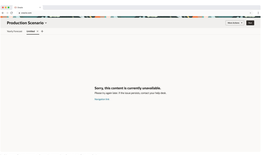


On Analysis mode, when there's no content on a page, the empty state message is displayed and it prompts the user to enter with mode so they can populate the content of the page.

In Layout Authoring Mode, when there's no content in the page yet, the default drop zone takes the space of the full panel for scoreboard and dashboard grid. The Library opens by default to allow the user to start building the layout.

Error

For more information on how to use Empty State messages, please review the spec on the RDC.



If a page load error occurs, an Empty state message should be displayed describing the type of issue.

In this example, an unexpected error is preventing the content from rendering.

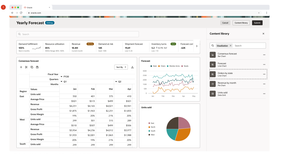
General Behaviors

When the panel is selected, the user can change the Panel Type in the Configuration Panel. Edit Label and Color on the Configuration Panel will trigger the changes on the Panel Content in real-time.

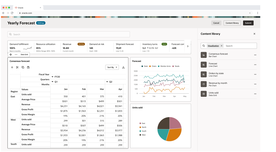
Real-time Preview - Configuration Drawer

Desktop

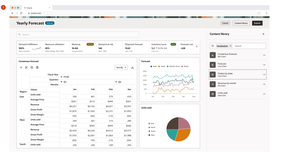
The user is able to move keyboard focus from the Preview Panel to the Configuration Panel and back by pressing the Option+W keys.



- The keyboard focus is on the content library "Order by Date" item.
- The Option+W key moves keyboard focus back to the first element of the dashboard layout.



- The keyboard focus is placed on the first interactive element of the dashboard layout.
- The user can press the Option+W keys to return to the last focused element inside the Configuration Panel.

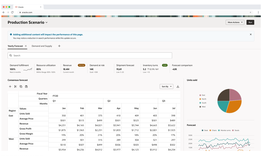


- The keyboard focus is back to the content library "Orders by date" item.

Message Banner Configurations

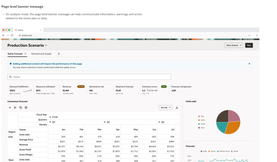
Data Authoring supports different levels of banner messages:

- Page Level - On both modes
- Tab level - On Analysis mode



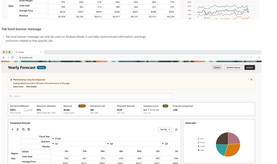
Page level banner message

- On analysis mode, the page level banner message can help communicate information, warnings and errors related to the entire plan or data.



Tab level banner message

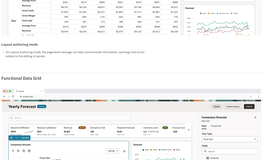
- Tab level banner message can only be seen on Analysis Mode. It can help communicate information, warnings and errors related to that specific tab.



Layout authoring mode

- On Layout Authoring Mode, the page level message can help communicate information, warnings and errors related to the editing of panels.

Functional Data Grid



- On analysis mode, the data grid is fully functional and has write-back capability.

Published

Redwood
Design
System

Behavior

Data Authoring Page Template - Add Panels

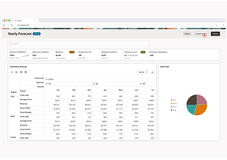
tip-up-data-authoring-page v1

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Adding a collection or visualization

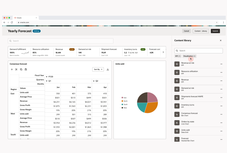
Drop zones

Data authoring page template uses the current Dashboard Layouts.



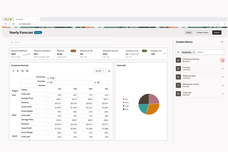
Library

- The Library contains all the available content the user can add to the layout.
- To open the Library, the user needs to click on the "Library" button on the header.



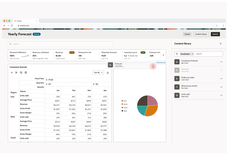
Filter content

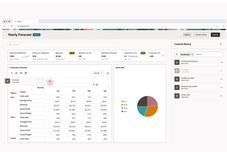
- By default, the Library displays all the types of content. The provided default suggestion chips can help the user filter between KPIs, Collections and Visualizations.
- The suggestion chips can adapt to what the different use cases need.



Drag

- To add a collection or visualization to the layout, the user grabs the list item drag handle and starts dragging to the dashboard grid.
- Once the list item is marked to move/grabbed, the list item changes to disabled state.
- If the user releases the click, the item goes back to enabled on the Library.





Drop

- All the possible drop zones are signaled by a blue line that appears when the user hovers over their defined space.
- If the user tries to add a the panel to a place it's not supported, the cursor changes to not allowed. (See 9a)

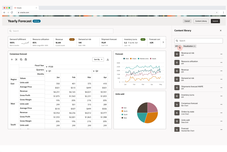
Dropped

- Once dropped, the list item goes back to enabled state on the content library. The user could add it again to the same page or to a different one.

Adding a KPI

Max KPIs

Dashboard can hold a maximum of 15 KPIs.

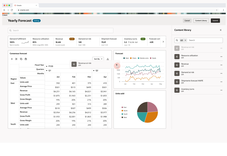


Filter KPIs

- By default, the Library displays all the types of panels. The provided default suggestion chips can help the user filter between KPIs, Collections and Visualizations.

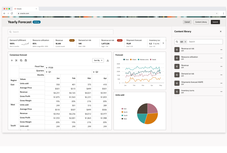
Drag

- To add a KPI to the scoreboard, the user grabs the list item drag handle and starts dragging to the scoreboard space.
- Once the list item is marked to move/grabbed, the list item changes to disabled state until it's dropped on the scoreboard.
- If the user releases the click, it goes back to enabled on the Library.



Drop

- All the possible drop zones are signaled by a blue line that appears when the user hovers over their defined space.
- In the case of KPIs, they can only be added to the scoreboard with a maximum of 15.
- If the user tries to add a KPI to the dashboard layout, the cursor changes to not allowed (See 9a)



Dropped

- Once dropped, the list item goes back to active on the content library. The user could add it again to the same page or to a different one.

Published

Redwood
Design
System

Behavior

Data Authoring Page Template - Move Panels

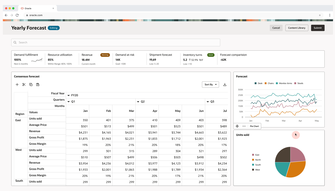
oj-sp-data-authoring-page NEW

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

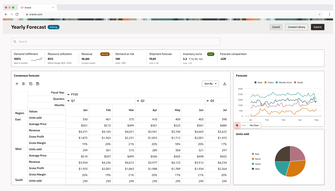
Moving panels

Drop zones
Data authoring page template uses the current Dashboard Layouts.

1



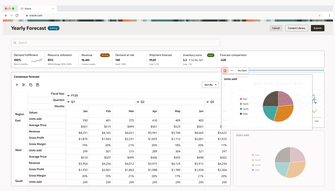
1a



Drag Panels

- Panels can be dragged from either the panel area or using the drag handle on the marquee (See 1a)

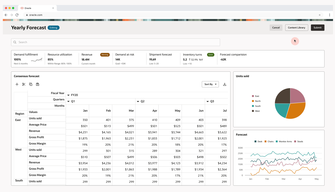
2



Drop

- All the possible drop zones are signaled by a blue line that appears when the user hovers over their defined space.
- The dragged panel remains on the original position and decreases opacity.

3



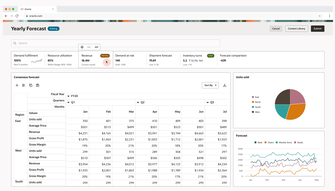
Dropped

- The layout changes only when the user releases the panel on a valid drop zone.

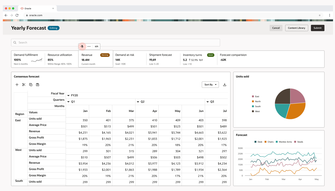
Moving KPIs

Scoreboard
KPIs can only be moved within the scoreboard at the top. Currently, we don't support other scoreboard positions or configurations.

1



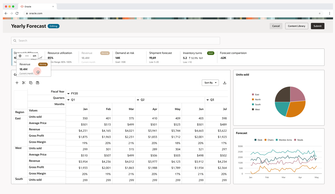
1a



Drag KPIs

- Panels can be dragged from either the panel area or the drag handle on the marquee (See 1a)

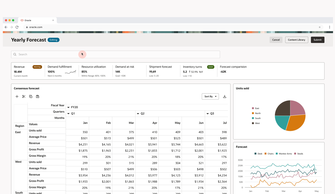
2



Drop KPIs

- All the possible drop zones are signaled by a blue line that appears when the user hovers over their defined space.
- The dragged KPI remains in the original position and decreases opacity.

3a



Dropped

- The scoreboard changes only when the user releases the panel on the new position.

Published

Redwood
Design
System

Behavior

Data Authoring Page Template - Remove Panels

oj-sp-data-authoring-page JA

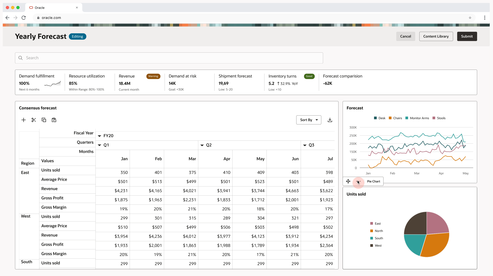
The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Removing Panels from the Marquee

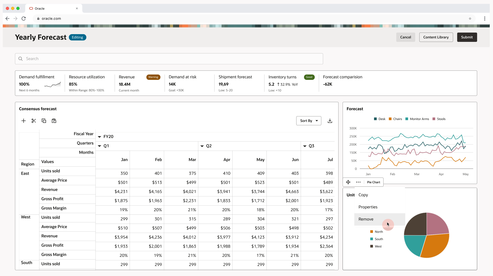
Persistence in content library

Panels and KPIs can be removed but they will still appear in the content library after being removed from the layout.

1



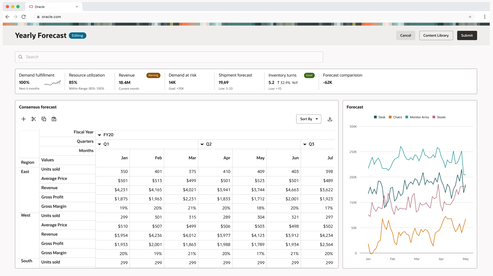
2



Remove via toolbar

- Panels and KPIs can be removed from the overflow menu in the toolbar with the "remove" option.

3

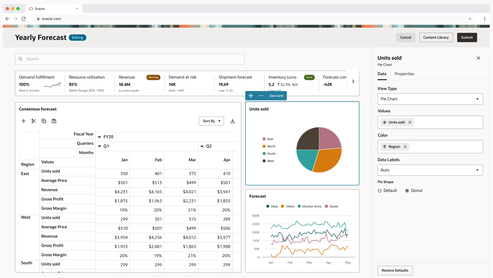


Layout

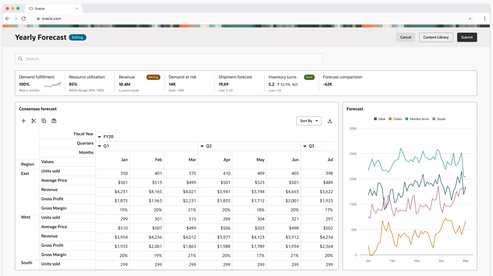
- Once removed, the panels will adjust automatically to fill the space in the dashboard layout.

Removing from keyboard

1



2



Delete via keyboard

- When focused or selected, it's possible to delete panels and KPIs by clicking on [delete]
- After deletion, focus moves to the previous panel. In case the first panel is removed, focus moves to the next panel.

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Behavior

Data Authoring Page Template - Edit Panel

oj-sp-data-authoring-page DS

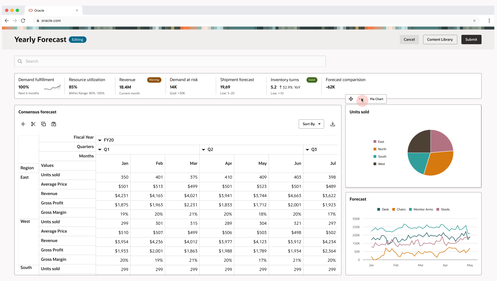
The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Editing Panels

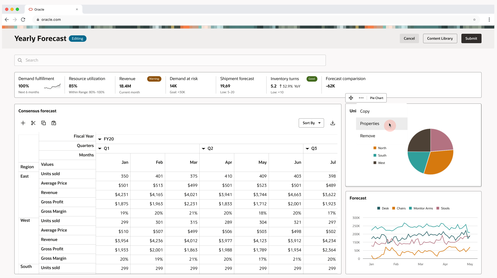
Panel configurations

The available configurations for each type of panel can be found in the configuration drawer for data and vis spec.

1



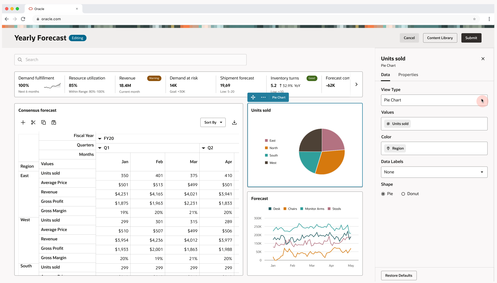
2



Accessing the configuration drawer

- Panels and KPIs can be edited from the overflow menu in the toolbar by selecting the "properties" option.
- The configuration drawer can also be opened by clicking the panel or putting focus on it and the clicking {return}.

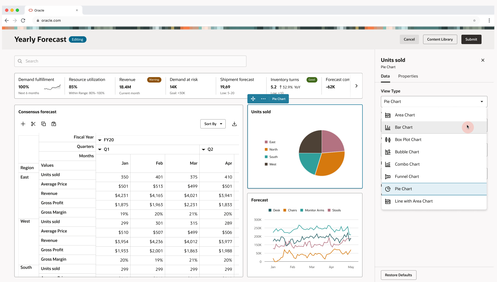
3



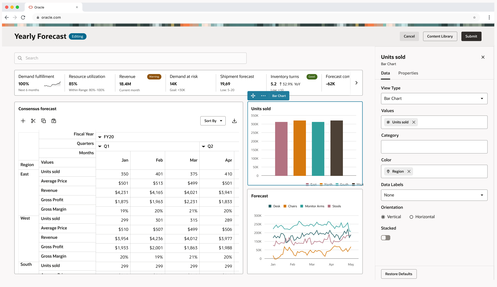
Selection

- The configuration drawer will reflect the available editing options for the panel that is currently selected.
- The selection can be moved by clicking on any other panel or KPI. The configuration drawer will reload to reflect the new element data.

4



4a



Editing

- The changes made on the configuration panel are shown in the layout in real time.
- The configuration drawer also allows to reset all the properties to their default state.

Published

Redwood
Design
System

Behavior

Data Authoring Page Template - Pages

ui-sp-data-authoring-page BETA

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Usage

The "New Page" experience allows the users in Data Authoring to create a new page from one of the layout templates or to open a page they have previously created.

Additional specs
View these component specs on the DCS.

Page Header | Section Overview | Information Organizer | Accordion | General Formatt | Configuration Assist | Smart Tooltip | Dashboard Landing Page Template

Anatomy

Desktop

Add new tab
When the user adds a new tab in the information organizer, the page selector offers create a new page from one of the layout templates or open a page they had previously created.

1. Section header
Required. It separates the predefined layouts section and the recent pages section.

2. Cards
Required. The cards show the schematic, title, and description of the layout.

3. Coverage bar

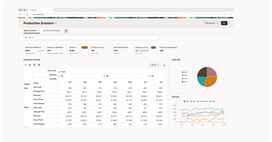
4. Smart Search
Optional. The Smart Search component is a search input tool with advanced filtering capabilities. It appears at the page level, applying to all the page content. Smart Search may optionally include Suggestion Chips. It allows the user to search all the previous pages they have created before.

5. List View
Optional. It shows the recent pages and is composed of icon, title, and secondary text that specifies when the page was opened last.

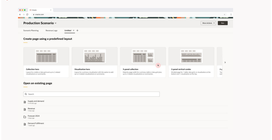
Opening a new page

The information organizer triggers the "Add tab" experience. Once the user clicks on the "Add tab" button, the system creates a new tab and suggests the empty layout authoring mode. Now the user can add widgets to the layout and save the page. Finally, the user can open the page in Analysis mode and building the page.

1



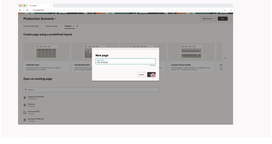
2



Add new tab

- Clicking the "Add tactical" on the information organizer creates a new tab and triggers the experience where the user can select how to populate the new tab.
- The second section is where the user can open recent pages they have previously worked on. This section helps the user understand all the options they can have to build their pages. Note that it contains the layouts that cannot be accessed via drag and drop.

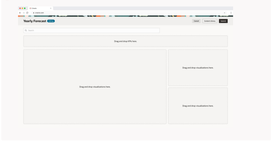
1



Naming the tab

- Once the user selects a card and clicks on it, a modal dialog pops up to follow the information organizer behavior to name a tab.

2



Empty layout authoring mode

- After the user names the pages and clicks on create on the dialog, they are taken to Layout Authoring mode to start building the page.
- The page will show the drop zones based on the layout the user selected.

1

Empty drop zones

- The empty drop drop zones can help the user know where to add panels.
- On mid-sized layouts, the user needs to add content in order for the empty layout drop zones to disappear.

1

- Once of the empty drop zones are filled, the drop zone default behavior is activated.

1

2

Partial empty drop zones

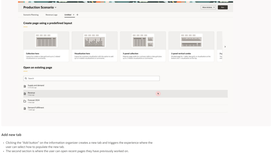
- If the user doesn't fill all the empty drop zone spaces and clicks **Layout**, the layout will adapt to the number of panels they added.

Opening a previous page

Recent Pages
The updating teams can configure the number of recent pages. Previously created pages can also be accessed by using the smart search.

1

2



Add new tab

- Clicking the "Add tactical" on the information organizer creates a new tab and triggers the experience where the user can select how to populate the new tab.
- The second section is where the user can open recent pages they have previously worked on.

1

Open previous page

- Once the user clicks on the selected page, the tab reloads to show the page in Analysis mode.

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Accessibility Notes

Data Authoring Template

oj-sp-data-authoring-page EX

The Data Authoring Template is a tool that allows users to explore, edit, visualize, collaborate on, and save data for future use. It also supports layout editing.

Accessibility Notes

This section is meant to ensure that designs are created while taking accessibility into account so that the component works well for people with a diverse range of hearing, movement, sight, and cognitive ability.

Additional links:
Review the ATs checklist and the WCAG standards for more guidance on accessibility for your component.

This template follows the Layout Editor capabilities accessibility considerations.

Screen Reader Considerations

Drag and Drop – Accessible interaction

When the user is in edit mode of the dashboard:

1. On first focus of the KPIs, the screen reader (SR) reads the aria-label of the component followed by instructions:

   Scoreboard metric cards, Use cut and paste and arrow keys to reorder, or add KPIs from the library.

2. On focus of an individual KPI or visualization, the SR states the name or type of the visualization in focus along with a brief instruction. When known, title is included, else use the view type. If neither is known, use the generic term "panel".

   Ratings by year pivot F2 for options
   Bar Chart pivot F2 for options
   KPI pivot F2 for options
   Panel pivot F2 for options

3. After the user either copies or cuts a KPI or visualization (e.g. Ctrl C or Ctrl X), the SR echoes back the action and the component name. The SR also states the new position the component would be included. Otherwise the object is ignored and only the action is echoed.

   US 2024 copied
   KPI copied
   panel copied
   Bar Chart cut
   cut

4. As the arrow keys are used to move the curve to different positions with the user's intent to add it to the dashboard, the SR states the KPI or Chart name, the current position and the position when it's available. The title is the name of the panel if provided, otherwise the name of the view type. If there is no object to the left of the position, the SR provides no additional context.

   Position 3 after Gross earnings
   Position 4 after Bar Chart
   Position 2

5. After the user pastes the copied/cut object, the SR acknowledges the user's action along with the context of the object and its placement.

   Gross earnings pasted into position 2 of 5
   Bar Chart pasted into position 1 of 5
   pasted into position 1 of 5

Add from Library (M, S, mobile breakpoints)

When the user is browsing the content library to add objects to the dashboard, the field action-self-announces the number of available objects. If it's a KPI, it's added as the first position of the scoreboard metric cards container. If it's another visualization, it's added as the first one after the KPIs.

The visual user gets that feedback right away but to avoid a confusing experience, the aria label for the add action provides this context.

Add to first position

Focus stays in the content library and a success aknowledgement is read by the SR.

US 2024 added
KPI added
added

Remove KPI/Visualization (all breakpoints)

For each removable KPI or visualization, the context menu has the Remove action. The SR reads the aria-label of the component followed by instructions. Ensure the user understands this somewhat destructive action without an undo opportunity.

Remove US 2024
Remove Bar Chart
Remove panel

Focus moves to the previous panel, or to the next panel if the first panel is removed. A success acknowledgement is read by the SR.

US 2024 removed
KPI removed
removed

Key mapping
CTRL + CMD (CMD on Mac, CTRL on Windows)

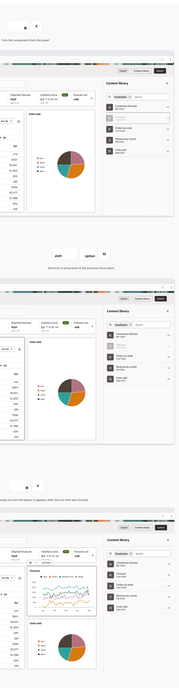
ALT + OPTION (OPTION on Mac, ALT on Windows)

Keyboard Interface

Keys	Action
tab or shift + tab	Moves keyboard focus to the next element in the order. Can be used to navigate to and within the elements within the template. Shift + tab moves focus backwards through the order.
option + M or shift + option + M	Keyboard shortcut to shift focus from the drawers to the first element within the layout. Shift + Opt + M moves focus back to the previous focus point in the drawer.
⌘ + X	Keyboard shortcut to cut the component in focus.
⌘ + C	Keyboard shortcut to copy the component in focus.
⌘ + V	Keyboard shortcut to paste after the component in focus.
Fn + F2	Keyboard shortcut to shift focus to the first action in the marquee toolbar.
return	On the drag handle: • Marquee shifts into a "move mode". Equivalent to cutting the component. On the overflow button: • Opens the menu.

Navigating to and from the canvas

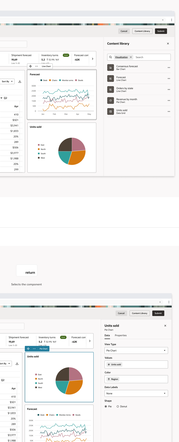
Adding components to the canvas through a side panel



The above example is a standard keyboard flow for cutting a component to add, shortcutting directly to the layout, and pasting the component previously marked into the layout.

Navigating within the canvas

Focus



On focus, the component displays the marquee to help make it more discoverable.

Component selection

After tapping (Return) or (Enter), the marquee enters a selected state

Quick reordering vs. Drag handle reordering

Components can be reordered by cut and pasting from the component area or through the drag handle. Both options are available to suit different levels of experience and discoverability.