



Dashboard Layouts

Content Block Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

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Overview

Design and organize content by selecting from eight layout templates, each offering up to four panels. Showcase existing dashboards or add new content blocks within each panel to create views tailored to your audience and goals.

Panel Interaction

Some panels include a movable splitter, allowing users to resize sections dynamically for better visibility or emphasis.

The screenshot displays a dashboard for 'Rocky Mtn Clubs'. It features two main data panels. The top panel, 'Professional Services Detail Input', is a table with columns for Company, Business Purpose, Select Entity, Cost Center, Region, and monthly expenses (Jan, Feb, Mar). The bottom panel, 'Professional Services Expenses', is a table with columns for Cost Center, Region, and monthly expenses (Jan, Feb, Mar, Apr, May). To the right of the bottom panel is a pie chart titled 'Expenses by Cost Center' showing the distribution of expenses across Sales, Marketing, and R&D.

| Company | Business Purpose | Select Entity | Cost Center | Region | Jan | Feb | Mar |
|---------------------------------|----------------------------------|-----------------|-------------|-----------|--------|---------|--------|
| ChartCo Consulting | COA redesign | Rocky Mtn Clubs | Sales | Northeast | 10,000 | 0 | 50,000 |
| Field Focus Partners | Go-to market strategies | Rocky Mtn Clubs | Marketing | Northeast | 0 | 125,000 | 0 |
| Marketing Inc. | Bi Annual South advertising | Rocky Mtn Clubs | Marketing | South | 30,000 | 0 | 0 |
| NA Sales Analytics | Sales team efficiencies | Rocky Mtn Clubs | Sales | South | 0 | 0 | 0 |
| New Age Metals Corp | New age golf shaft design | Rocky Mtn Clubs | R&D | Midwest | 0 | 0 | 0 |
| New Methods | Manufacturing process assistance | Rocky Mtn Clubs | R&D | Southwest | 0 | 0 | 0 |
| Territory Management Consulting | Western territory mapping | Rocky Mtn Clubs | Sales | West | 0 | 0 | 50,000 |

| Cost Center | Region | Jan | Feb | Mar | Apr | May |
|-------------|-----------|--------|--------|--------|--------|--------|
| Sales | Northeast | 20,854 | 25,001 | 24,908 | 25,091 | 25,091 |
| | South | 31,075 | 37,216 | 36,866 | 37,080 | 37,080 |
| | Southwest | 7,080 | 8,526 | 8,673 | 8,764 | 8,764 |
| | Midwest | 13,873 | 16,668 | 16,722 | 16,836 | 16,836 |
| | West | 17,938 | 21,593 | 22,001 | 22,151 | 22,151 |
| Marketing | Northeast | 2,048 | 2,455 | 2,449 | 2,461 | 2,461 |
| | South | 3,047 | 3,650 | 3,611 | 3,630 | 3,630 |
| | Southwest | 697 | 839 | 853 | 862 | 862 |
| | Midwest | 1,363 | 1,641 | 1,641 | 1,654 | 1,654 |
| | West | 1,753 | 2,113 | 2,155 | 2,169 | 2,169 |

| Cost Center | Expense |
|-------------|-------------|
| Sales | \$1,216,888 |
| Marketing | \$122,145 |
| R&D | \$70,259 |

Use Cases

- Dashboard Configuration
- Reporting and Analytics
- User Interface Configuration

Designer

Layout

Use the Layout section to define how your content is structured and displayed on a single page.

- **Select a Layout Template:** Select from eight predefined templates, each supporting up to four panels
- **Panel Configuration Considerations:**
 - Number of panels needed
 - Type of content assigned to each panel
 - Desired arrangement of panels (e.g., grid, stacked, side-by-side)



Panels

Each panel serves as a container for content. You can populate panels in two ways:

- **Link:** Display an existing dashboard.
- **Add:** Insert and configure another content block
 - After adding a block, click Edit to access its settings.
 - Click Clear to remove the block.

NOTE: Only **shareable workspaces** appear in the dropdown menu when linking existing dashboards. Ensure the Shareable property is set to True for all applicable workspaces. The Default Workspace is excluded.

See *Appendix 1* for more details on Workspace requirements and considerations.

Panel Sizing

- Enter Height and Width dimensions in pixels (e.g., 400).
- Use * to allow dynamic resizing based on the container.

Borders

- The Borders setting controls whether a visible border appears around each panel.

| Panel | Selected Content | Height | Width | Borders | |
|-------|--|--------|-------|---------|--|
| 1 | Link Add | * | | Show ▾ | |
| 2 | Link Add | | * | Show ▾ | |
| 3 | Link Add | | * | Show ▾ | |

Content Settings

Customize the dashboard's appearance using the following options:

Toolbar

- Set **Toolbar State** to Visible to add a horizontal toolbar panel at the top of the dashboard. This is in addition to the layout panels.
- Once enabled, a dedicated Toolbar Panel appears in the Panel section. You can configure it to display an existing dashboard or a new content block, such as a label or KPIs.

| Panel | Selected Content | Height | Width | Borders |
|---------|--|--------|-------|---------|
| Toolbar | Link Add | 50 | | |
| 1 | Link Add | * | | Show ▾ |
| 2 | Link Add | | * | Show ▾ |
| 3 | Link Add | | * | Show ▾ |

Content Settings

Toolbar State

Canvas Background

- Use the **Background Color** setting to apply a color to the dashboard canvas.

- Accepts hex codes (e.g., #FF000000) or OneStream color names (e.g., Red).



Panel Padding

- Set Padding to Yes to add spacing between panels for visual clarity.
- Set to No for edge-to-edge panel display.

Appendix 1

Workspace Requirements and Considerations

Workspace objects:

- Dashboards
- Cube Views
- Parameters
- Data Management Sequences/Steps
- Business Rule Assemblies:
 - XFBRStrings
 - Dashboard Extenders

Requirements for all Workspaces and objects you intend to use in Genesis:

| Requirements | Options |
|--|--|
| Shareable Workspaces: | Ensure the Is Shareable Workspace setting is set to True on each Workspace; this excludes the Default Workspace. |
| Share Workspaces with Genesis Workspace: | Locate the Genesis Workspace and ensure each Workspace is assigned to the Shared Workspace Names property. |
| Object Storage: | Same Shareable Workspace <ul style="list-style-type: none"> • All objects stored together Default Workspace <ul style="list-style-type: none"> • All objects stored in the Default Workspace Default/Shareable Workspace <ul style="list-style-type: none"> • Universal objects stored in Default Workspace (Parameters, Data Management Sequences) • Cube View stored in separate shareable Workspace |
| Row/Column Sharing Cube View Storage: | <ul style="list-style-type: none"> • Default Workspace • Shareable Workspace Must be assigned to Genesis via Shared Workspace setting Stored in the same shareable Workspace |
| Include the Workspace Name when calling objects: | <ul style="list-style-type: none"> • Calculation Details: Parameters, Assemblies or Data Management Sequences Ex: {WSName.MySequenceName}{NameValuePair=WSName.Param Name} |

Release Notes

Version 2.0.0

This major release introduces block upgradeability further strengthening content development and management. This capability is foundational to how Genesis content will evolve going forward.

Important Notes

Upgradeability is only available for blocks running version 2.0.0 or later. Existing blocks on version 1.x must be migrated to 2.0.0 first. This is a one-time process. See *Content Block Upgrade Path* below for migration details.

Enhancements

Block Upgradeability

This block has been updated to fully support the new upgradeability framework introduced in Genesis 2.0.0. This ensures that the block can evolve over time without requiring pages to be rebuilt or configurations to be recreated.

The following capabilities are now available for all blocks at version 2.0.0 and above:

- Version Awareness**
Blocks now report their version and indicate when a newer version is available. Administrators can see at a glance which pages are running older versions.
- Compatibility Validation**
Each block now includes version-to-version compatibility rules. During an upgrade, Genesis automatically checks whether content and configuration can be safely migrated.
- Selective Upgrades**
Identify and select specific blocks to upgrade on specific pages.
- Configuration and Content Preservation**
Upgrades carry forward existing filter settings, parameters, and layout configuration. Pages do not need to be rebuilt.

Important Note: This feature is not retroactive. Blocks on version 1.x do not include the upgradeability framework. They must be migrated to 2.0.0 first. See *Content Block Upgrade Path* below for migration details.

Platform and Genesis Compatibility

Genesis Version Requirement

Blocks at version 2.0.0 are only compatible with Genesis 2.0 or later.

Do not inject a 2.0.0 block into a Genesis 1.x Instance. The block will not function, and the upgradeability features will not be available.

| | |
|--------------------------|-------|
| Minimum Platform Version | 9.0.0 |
| Minimum Genesis Version | 2.0.0 |

Content Block Upgrade Path

One-time Migration: Moving an Existing Block to Version 2.0

This process applies only to blocks currently on version 1.x. Follow these steps once to bring your existing block up to version 2.0.

After completing this migration, future upgrades can be performed directly within Genesis and will not require content re-building.

1. Create a new page and set its visibility to Hidden.
2. Inject and configure the 2.0.0 version of the block on this page.
3. Verify functionality to ensure the block behaves as expected.
4. Hide the original page and make the new page visible.
5. After end-user confirmation, delete the original block and page.

Why is this still required for 2.0?

Block upgradeability is functionality built into the 2.0.0 block itself. Blocks on version 1.x do not include this functionality and therefore cannot be upgraded in place. The steps above are the final time you will need to follow this process for this block.

Upgrading from 2.0.0 to Future Versions

Once a block is running version 2.0.0 or later, upgrades are handled directly within Genesis. No page rebuilding or reconfiguration is required.

Refer to the [Genesis Guide](#) for more details on the block upgrade process.

Version 1.1.0

This release focuses on simplifying the dashboard design experience and giving users greater control over layout presentation.

Enhancements

- **Consolidated Tabs**
The Designer Page has been streamlined for a more intuitive configuration experience. Previously separate tabs labeled Layout and Menu have been removed, and all configuration options are now presented on a single, unified screen.
- **Apply Panel Borders**

Panels now support border settings. When a panel's border is set to Show, a visible border is rendered around the card in the end-user view. When set to Hide, the panel appears without a border.

- **Apply Padding between Panels**
When the Padding setting is set to Yes, padding is added between panels to create visual separation in the end-user view. When set to No, panels appear directly adjacent to one another for a more compact layout.
- **Apply Canvas Background Color**
Customize the canvas behind dashboard panels by setting a background color. The canvas renders with that color in the end-user view, enhancing visual clarity.
- **Toolbar Panel Configuration Simplified**
Previously managed in a separate tab, you can now enable and configure the toolbar directly within the unified Designer Page. When activated, a dedicated panel labeled Toolbar appears at the top of the panel list, allowing content to be linked or added.

Upgrade Information

IMPORTANT: Upgrade Limitation for Injected Blocks

An already injected block from a prior version cannot be upgraded to the new version.

Recommended Actions

To use the latest version of a block:

1. Delete the existing block from the page.
2. Inject and configure the new version of the block in its place.

Alternative Approach

If you prefer a safer transition:

1. Create a new page where the new version of the block is injected and configured.
2. Once you've verified the new block behaves as expected, delete the original page and block.

Platform and Genesis Compatibility

- Minimum Platform Version: 9.0.0
- Minimum Genesis Version: 1.0.0

Version 1.0.0

This marks the initial release of the block, introducing core functionality and layout capabilities.

Platform and Genesis Compatibility

- Minimum Platform Version: 9.0.0
- Minimum Genesis Version: 1.0.0