



Toolbar With Layouts Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

Copyright © 2026 OneStream Software LLC. All rights reserved.

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

Table of Contents

Overview	3
Use Cases	3
Designer Page (Configuration).....	4
Toolbar Settings.....	4
Toolbar Objects.....	5
Buttons	5
Filters (Combo Boxes).....	7
Refresh & Sync Best Practices.....	7
Layout.....	8
Release Notes.....	9
Version 2.0.0.....	9
Version 1.1.0.....	10
Version 1.0.0.....	11

Overview

The Toolbar Block supports buttons, combo boxes (filters), and titles, allowing you to build interactive, consistent user interfaces for analytics and workflow tasks. The block contains a layout section which allows you to inject additional content to use with the toolbar.

The screenshot shows a 'Planning' dashboard with a toolbar at the top right containing 'Admin' and 'Help' buttons. Below the toolbar is a dropdown menu for 'Entity: Rocky Mtn Clubs'. The main content is a table with the following data:

	Actual	Jan 2025 Budget Final	Variance	Variance %
Wholesale	20,629,045	20,633,257	(4,212)	-0.02%
eCommerce	10,229,577	10,245,400	(15,823)	-0.15%
Direct	6,745,761	6,647,300	98,461	1.48%
Component	4,541,877	4,635,400	(93,523)	-2.02%
Intercompany sales	648,134	623,200	24,934	4.00%
Product revenue	42,794,394	42,784,557	9,837	0.02%
Discounts	(1,064,638)	(1,082,100)	17,462	1.61%
Returns	(1,997,624)	(2,017,500)	19,876	0.99%
Adjustments to revenue	(3,062,262)	(3,099,600)	37,338	1.20%
Revenues	39,732,132	39,684,957	47,175	0.12%

Use Cases

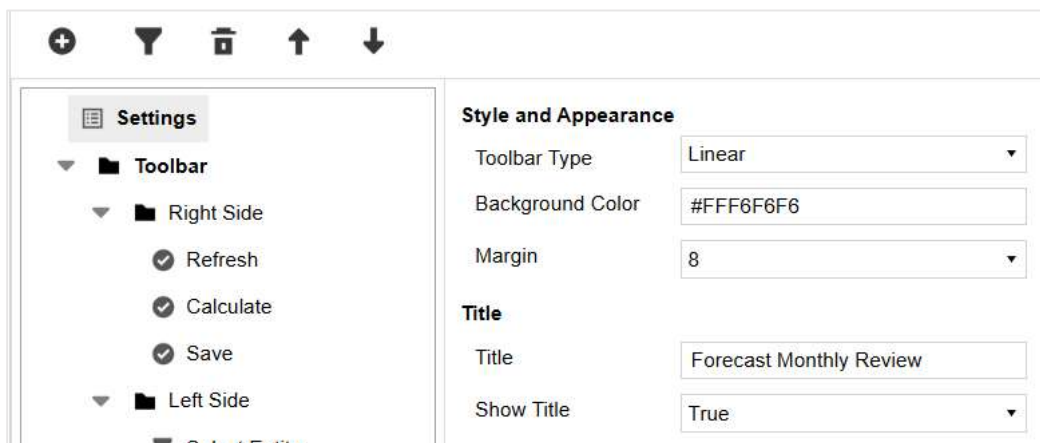
- Supports two toolbar layouts: linear (horizontal) and stacked (vertical).
- Add labels, titles, combo boxes (filters), and multiple button types.
- Buttons can trigger business rules, open dialogs, complete workflows, set point of view, run calculations, refresh/redraw dashboards, and navigate to other pages or files.
- Ensures a clean, consistent UI and contains a layout option use with additional content

Designer Page (Configuration)

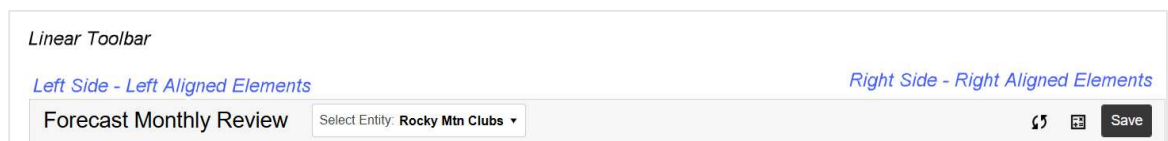
After injecting the block, use the Designer page to configure it. It is divided into two core sections: Toolbar and Layout. The settings in each section control the toolbar's behaviors and capabilities and are configured based on user interaction and consumption.

Toolbar Settings

These properties define the toolbar title, styling, and overall appearance.

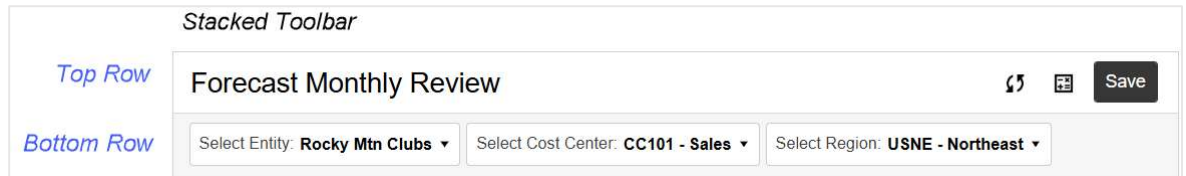


- **Toolbar Type**
Choose between linear (horizontal) and stacked (vertical) layouts.
 - **Linear**



- The designer tree displays sections for the Left Side and Right Side of the toolbar.
- Elements added to the Left Side section will appear on the left side of the toolbar, while elements added to the Right Side section will appear on the right side.
- Left Side Rules:
 - Can contain both filters and buttons.
 - Filters always appear on the far left, before buttons, regardless of sort order.
- Right Side Rules:
 - Can contain buttons only.

- **Stacked**



- The designer tree displays sections for the Top Row and Bottom Row.
 - Elements added to the Top Row section will appear in the top row of the toolbar, right-aligned. Elements added to the Bottom Row section will appear in the bottom row of the toolbar, left-aligned.
 - Top Row Rules:
 - Can contain buttons only.
 - Bottom Row Rules:
 - Can contain both filters and buttons.
 - Filters always appear on the far left, before buttons, regardless of sort order.
- **Background Color**
 - Set a color using a hex code in format #FFxxxxxx or enter a standard OneStream color name.
 - Recommended: Use the default color (matches layout blocks) or white.
 - In stacked toolbars, the background color applies only to the Bottom Row.
 - **Margin**
 - Customize left and right margins.
 - **Title**
 - Enter a title and choose to show or hide it.

Toolbar Objects


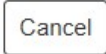


Buttons

To add a button:

1. Select the toolbar position.
2. Click the Plus (+) button.
3. Configure button properties.

Reorder buttons using Up and Down arrows.

Button Properties

- **Name**
Appears as button text for Primary, Secondary, and Transparent types.
- **Display Types**
Choose a visual style that best reflects the purpose, priority, and intent.
 - Standard primary button

 - Standard secondary button

 - Image-only button

 - Transparent button

- **Tool Tip**
Text shown on hover.
- **Enable Save**
Set to True to perform a Save action on click.
- **Point Of View**
Configure to change the POV or workflow on click.
- **Server Task**
Configure to trigger business logic on click (e.g., business rule, calculation, workflow completion).
- **User Interface**
Configure to trigger UI actions on click (e.g., refresh dashboard, open dialog).
- **Navigation Action**
Configure to navigate to pages, files, or websites.

Filters (Combo Boxes)

To add a filter:

1. Select the toolbar position.
2. Click the Funnel (▼) icon.
3. Configure filter properties.

Reorder filters using Up and Down arrows.

Filter Properties

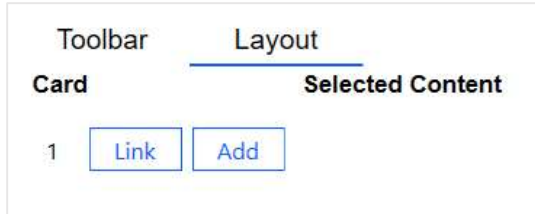
- **Name**
Name the filter.
- **Tool Tip**
Text shown on hover.
- **Bound Parameter**
Bind filter to a parameter (drives the combo box).
- **Point Of View**
Configure to change the POV or workflow on click.
- **User Interface**
Configure to trigger UI actions on click (e.g., refresh dashboard, open dialog).

Refresh & Sync Best Practices

- When using multiple toolbars in a layout, always refresh the toolbar block whenever other content is refreshed to keep filters and toolbar state in sync.
- For consistent refresh behavior, refresh the card or row (not just the individual block) within layouts.

Layout

To display additional content below the toolbar, configure the Layout section. Common blocks include Embedded Cube Views, Embedded BI Viewer, or Embedded Grids.



Add

- To inject a new block from the content library, click Add and select an embeddable block.
- After adding the block, click Edit to open its Designer and configure it according to its specific guide.

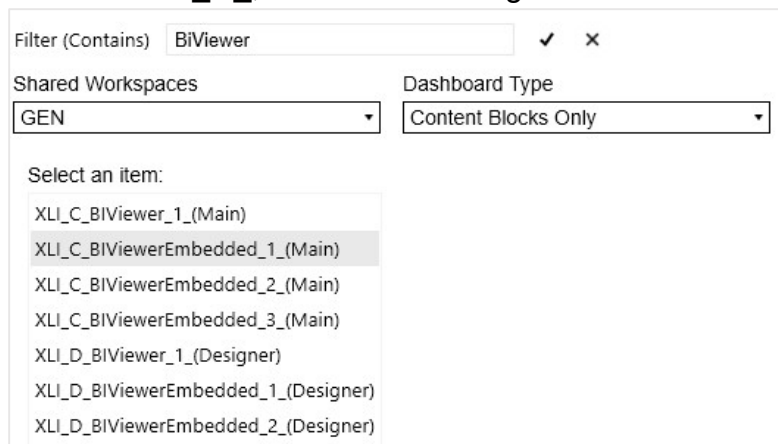
Link

- To link an already injected block or another dashboard, click Link and select the desired dashboard name.
- **TIP:** When searching for the dashboard name of an injected block:
 - Set the Dashboard Type filter to **Content Blocks Only**
 - Look for the following name pattern:
XLI_C_{BlockName}_{Sequence}_{Main}

Example

The block *BI Viewer Embedded* is injected three times.

In the Dashboard Selector, search results are limited to keyword *BIViewer*, and the Dashboard Type filter is set to Content Blocks Only. Locate items that start with **XLI_C_**, and select the target instance of the injected block.



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:

1. **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.

2. **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.

3. **Selective Upgrades**

Identify and select specific blocks to upgrade on specific pages.

4. **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 improving the performance of the block.

Fixed Issues

- Enhanced the block's dynamic object handling to enhance overall block and workspace performance.

Version 1.0.0

This is the initial release of the block.

Platform and Genesis Compatibility

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