



Grid View Content Block Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

Jump to [Release Notes](#)

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Overview

The Grid View Content Block displays data in a grid giving users an easy way to analyze and filter on custom data sets. A pre-selected Data Adapter provides the source data which can be Cube, relational and/or external data. Filters are dynamically generated for each Parameter in the Data Adapter(s) and can be added or removed as needed.

My Grid View

prm_SelectEntity_RPTFIN Rocky Mtn Clubs ▾ Refresh

Drag a column header and drop it here to group by that column

| Cube | Entity | Parent | Cons | Scenario | Time | StartDate | EndDate | View | Account |
|---------------------|-------------------|--------|--------------------|----------|----------|-------------------|-------------------|------|--------------|
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Jan 2024 | 1/1/2024 12:00... | 1/31/2024 12:0... | MTD | 40000 - Net |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Jan 2024 | 1/1/2024 12:00... | 1/31/2024 12:0... | MTD | 59999 - Gros |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Jan 2024 | 1/1/2024 12:00... | 1/31/2024 12:0... | MTD | 50000 - Cost |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Feb 2024 | 2/1/2024 12:00... | 2/29/2024 12:0... | MTD | 40000 - Net |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Feb 2024 | 2/1/2024 12:00... | 2/29/2024 12:0... | MTD | 59999 - Gros |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Feb 2024 | 2/1/2024 12:00... | 2/29/2024 12:0... | MTD | 50000 - Cost |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Mar 2024 | 3/1/2024 12:00... | 3/31/2024 12:0... | MTD | 40000 - Net |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Mar 2024 | 3/1/2024 12:00... | 3/31/2024 12:0... | MTD | 59999 - Gros |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Mar 2024 | 3/1/2024 12:00... | 3/31/2024 12:0... | MTD | 50000 - Cost |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Apr 2024 | 4/1/2024 12:00... | 4/30/2024 12:0... | MTD | 40000 - Net |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Apr 2024 | 4/1/2024 12:00... | 4/30/2024 12:0... | MTD | 59999 - Gros |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Apr 2024 | 4/1/2024 12:00... | 4/30/2024 12:0... | MTD | 50000 - Cost |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | May 2024 | 5/1/2024 12:00... | 5/31/2024 12:0... | MTD | 40000 - Net |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | May 2024 | 5/1/2024 12:00... | 5/31/2024 12:0... | MTD | 59999 - Gros |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | May 2024 | 5/1/2024 12:00... | 5/31/2024 12:0... | MTD | 50000 - Cost |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Jun 2024 | 6/1/2024 12:00... | 6/30/2024 12:0... | MTD | 40000 - Net |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Jun 2024 | 6/1/2024 12:00... | 6/30/2024 12:0... | MTD | 59999 - Gros |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Jun 2024 | 6/1/2024 12:00... | 6/30/2024 12:0... | MTD | 50000 - Cost |
| Equipment Divisi... | EUS01 - Rocky ... | | USD - United St... | Actual | Jul 2024 | 7/1/2024 12:00... | 7/31/2024 12:0... | MTD | 40000 - Net |

Use Cases

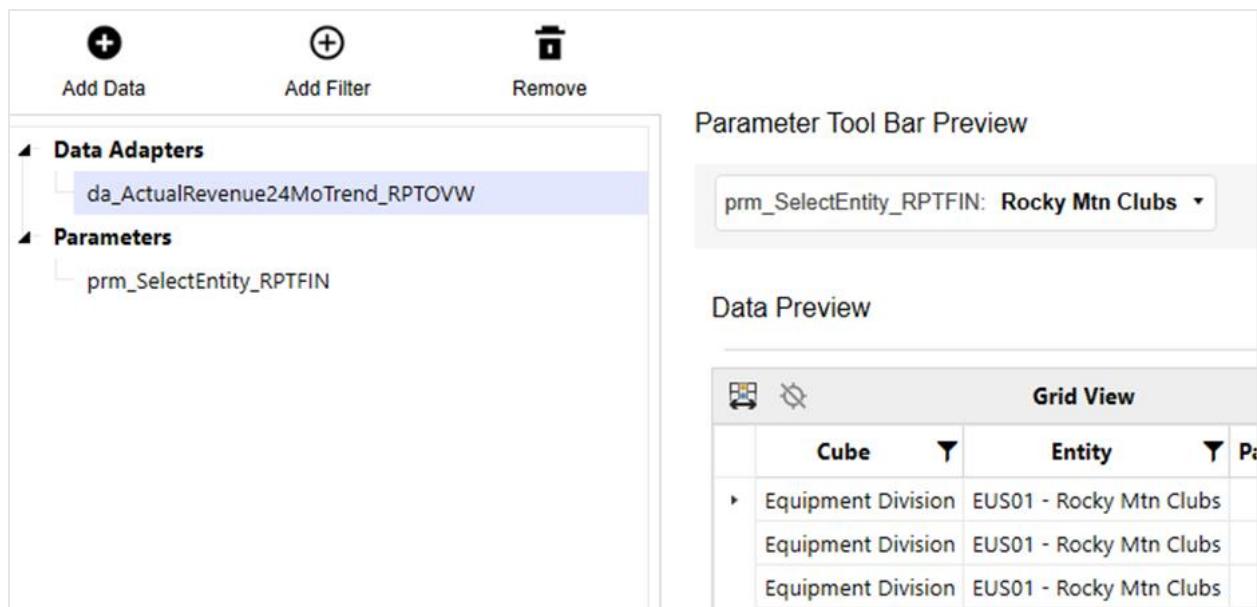
- Detailed analysis of tabular data in grid format

Designer Page (Configuration)

After injecting the block, use the Designer page to configure it. The page is divided into two tabs: Data and Settings

Data

The Data Tab is where you assign the Data Adapter(s) you want to use with the grid and configure its filters.



Add Data

To assign a data adapter, click Add Data and choose one from any sharable workspace. Only one Data Adapter can be assigned. If the Data Adapter contains Parameters, you will see them listed (excluding Literal Value and Input Parameters).

NOTE: The Workspace where the Data Adapter(s) are stored must be **shareable**, otherwise it will not appear in the drop-down menu. Set the Shareable property to True on all applicable Workspaces; this excludes the Default Workspace.

See *Appendix 1* for more information on Workspace Requirements and Parameter behavior.

Preview Data

Once an adapter is assigned, select it to generate a data preview. This displays the first 20 rows of data from the Data Adapter.

Add Filter

Allows users to add parameters that were not automatically detected by the Cube View block.

- Click Add Parameter.
- In the Select Parameter dialog:
 - Choose a workspace from the dropdown.
 - Browse or filter parameters in the tree view.

- Select the parameter, then click Save.

Remove

Remove a parameter from from the Grid View. Does not delete the parameter from the workspace.

- Select the parameter and click Remove Parameter.

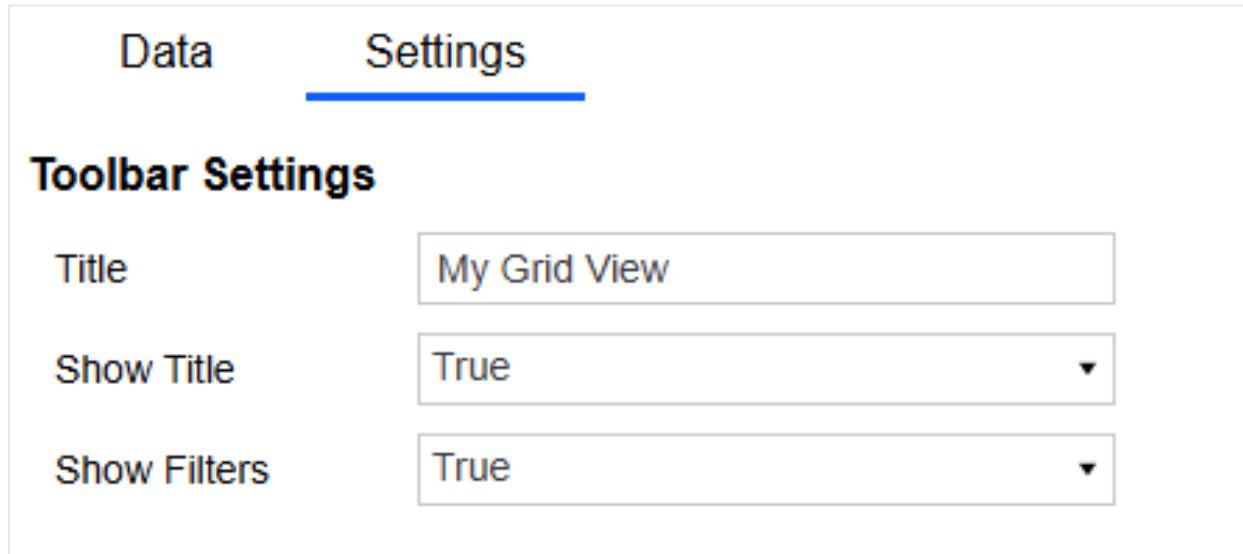
Parameter Properties

To configure a parameter's filter behavior, select it and modify its properties.

- **Display Order**
Enter a numeric value to set the sequence in which parameters are displayed.
- **User Prompt**
Defines the text displayed as the parameter label in the filter toolbar. Enter a descriptive message that guides the user. For example, *Select a Product member* or *Enter your name*. If left blank, the parameter Name will display as the label.
- **Filter Type**
Determines how the user selection displays:
 - **Combo Box**: Displays a drop-down list of available values. (default option)
 - **Member Selector**: Displays a hierarchical member tree for selection.
- **Enabled**
Parameter does not appear in the filter toolbar. The user is prompted on page launch to select a value.

Settings

The Settings Tab is where you specify Toolbar settings such as title and filter display.



| Data | Settings |
|-------------------------|--|
| Toolbar Settings | |
| Title | <input type="text" value="My Grid View"/> |
| Show Title | <input data-bbox="600 688 1292 762" type="text" value="True"/> |
| Show Filters | <input data-bbox="600 789 1292 863" type="text" value="True"/> |

Title

Enter the title to be displayed in the toolbar.

Show Title

Set to True to display the toolbar that contains the Title.

Show Filters

Set to True to show parameters as embedded filters.

Appendix 1

Workspace Requirements and Considerations

Workspace objects:

- Data Adapters
- Parameters

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 such as Parameters stored in Default• Data Adapters stored in separate shareable Workspace |

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 1.2.0

Describe high-level theme for this release. Example: This release focuses on simplifying the dashboard design experience and giving users greater control over layout presentation.

Enhancements

- **Filter Label uses User Prompt**
Filter labels now use the parameter's User Prompt instead of the Description.
- **Silent Save for Parameter Settings**
Changes to Parameter Settings now save immediately without displaying a confirmation popup, reducing interruptions and streamlining the workflow.

Platform and Genesis Compatibility

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

Version 1.1.0

The theme of this minor release is bug fixes enhancements to existing functionality.

Enhancements

- **Grid View Show Title**
The Grid View Header automatically adjusts based on the Show Title Toolbar Setting. If Show Title is set to False, all extra space is removed, and the content displays full page.
- **Grid View Show Filters**
The Refresh Button in the Grid View header will only display when Show Filters is set to True. If it is set to False, the button is removed from the header.

Platform and Genesis Compatibility

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

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