



Toolbar Embedded 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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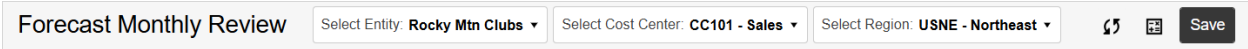
Overview

The Toolbar Embedded Block enables you to create interactive toolbars within dashboard layout content blocks. It supports button, filter, and title UI elements, allowing you to build interactive, consistent user interfaces for analytics and workflow tasks. The block can be embedded in layout content blocks and is available in two layouts: linear and stacked.

Stacked Toolbar



Linear Toolbar

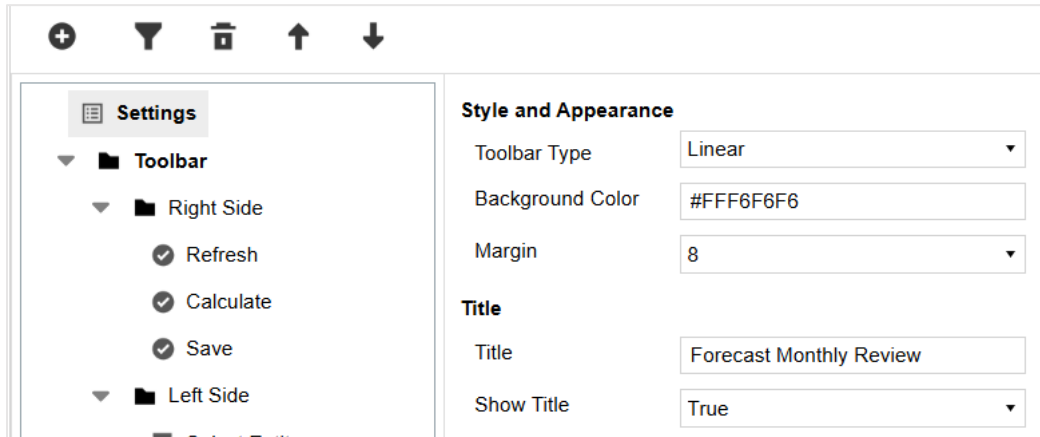


Designer Page (Configuration)

After injecting the block, use the Designer page to configure its appearance and UI elements.

Toolbar Settings

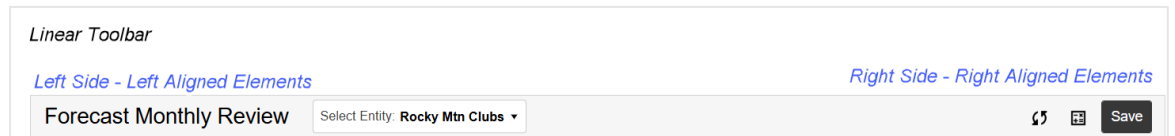
These properties define the toolbar title, styling, and overall appearance.



- **Toolbar Type**

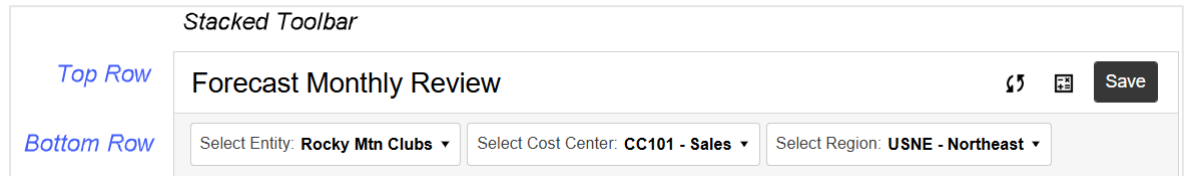
Choose between linear (horizontal) and stacked (vertical) layouts.

- **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.


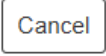


Buttons

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.

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. This feature is not retroactive 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.

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.

5. Force Upgrade

Provides an in-place replacement path that bypasses standard validation. This avoids a full manual reinject and reconfiguration, however configuration settings and generated artifacts may not be fully preserved.

- **Not all Content Blocks support Force Upgrade.** This section only appears in release notes for blocks that do. See the [Genesis Guide](#) for the complete list of blocks and feature details.
- Intended for Content Blocks whose current injected version predates Genesis 2.0.0
- Force Upgrade must be enabled in your Genesis instance and can only be executed by System and Application Administrators.

Workflow Buttons & Status Indicator

A new *Enable Workflow Menu* Property was added to the toolbar settings. When enabled the Toolbar displays the following out of the box:

- Complete/Revert Workflow Buttons
- In Progress/Complete Workflow Status Indicators

The Workflow menu is displayed on the right-hand side of the toolbar. As you interact with the Workflow buttons, the Workflow status refreshes and provides a visual indication of where you are in the Workflow process.

This does not require you to configure Workflow Buttons; the buttons and indicator display by default when this feature is enabled.

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.

Option A: Standard Migration (*recommended; always available*)

This process carries no risk of configuration loss. It is the recommended path for most blocks.

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.

Option B: Force Upgrade (*admin only function; not available for all content blocks*)

Only use Force Upgrade when all of the following are true:

- You have invested heavily in content built with a first-generation (1.x) block.
- The effort to manually remove, reinject, and reconfigure the block is not acceptable.
- You have reviewed and accepted the risk that some configuration and generated artifacts may not carry over.

Note: If preserving your existing configuration is critical, use Option A instead.

Performing a Force Upgrade:

1. Confirm that this block appears in the list of supported blocks.
2. Enable Force Upgrade in your Genesis Instance under Library Management.
3. Execute via the Upgrade page located under Content Management (only administrators can execute a Force Upgrade).

Why is this still required for 2.0?

Block upgradeability is functionality built into the 2.0.0 block itself, this is not included in Blocks running on version 1.x. This is a one-time process.

Upgrading from 2.0.0 to Future Versions

Once a block is running version 2.0.0 or later, upgrades are handled directly within your Genesis Instance. Force upgrades and content reconfigurations will no longer be required.

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

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 solution running Genesis 1.x. 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

Version 1.2.0

The theme of this minor release contains a bug fix.

Fixed

- Resolved an issue when using Parameters or Substitution Variables in Server Task Arguments. Now, both can be used using the Genesis syntax: ~|myParamName|~ and ~SubVarName~

Version 1.1.0

This release focuses on improving the performance of the block.

Fixed

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