



Advanced Dashboard Layouts Content Block Guide

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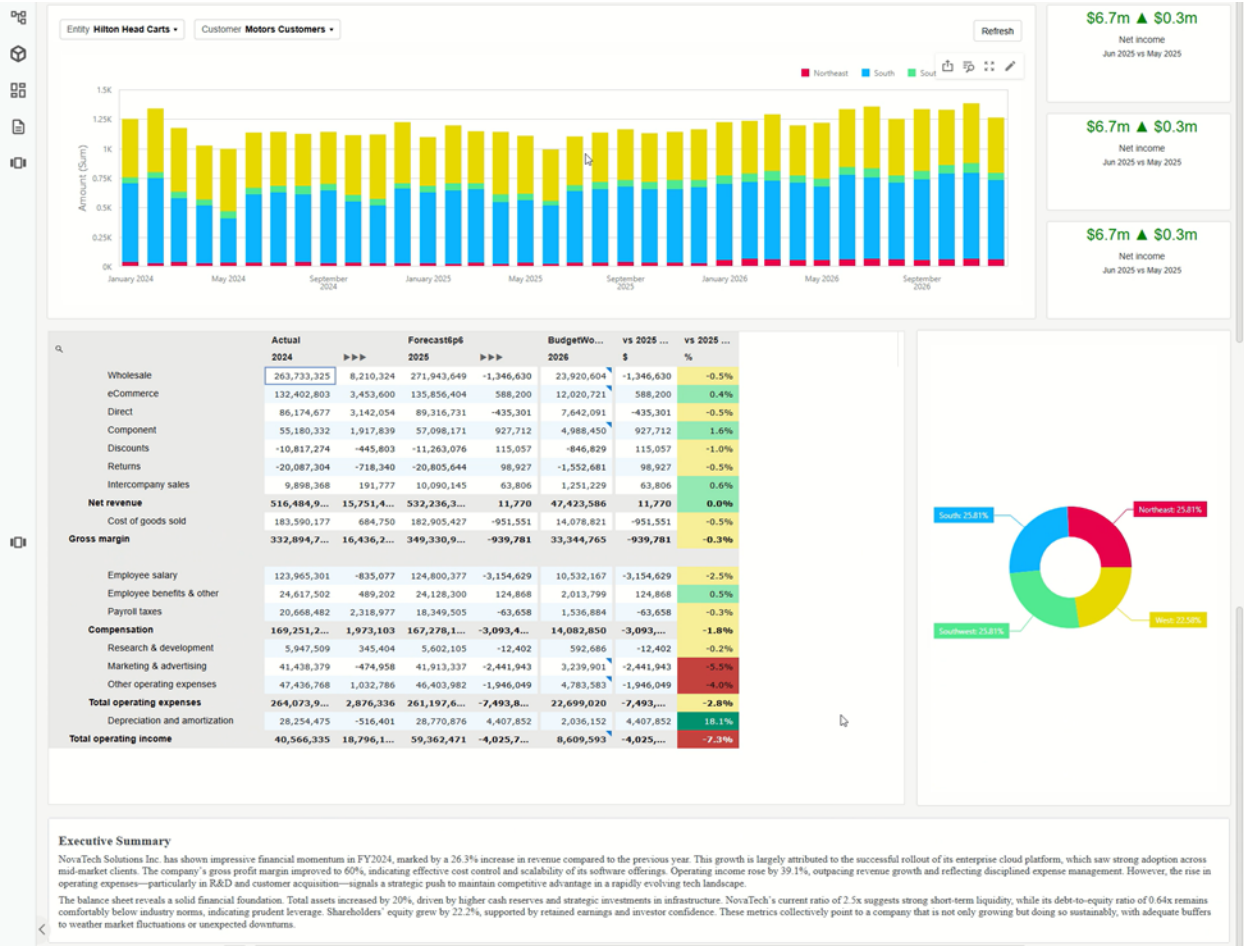
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Overview

The Genesis Advanced Dashboard Layouts Content Block enables you to organize cards filled with embedded Content Blocks or linked content from existing dashboards. This Content Block is ideal for creating interactive, vibrant analytics pages, custom landing pages, or data input dashboards. It is designed to be used with the many embedded Content Blocks available in the Content Library. You can mix and match content on a single page or build a scrollable newsfeed-style dashboard, providing flexibility for a wide range of use cases.

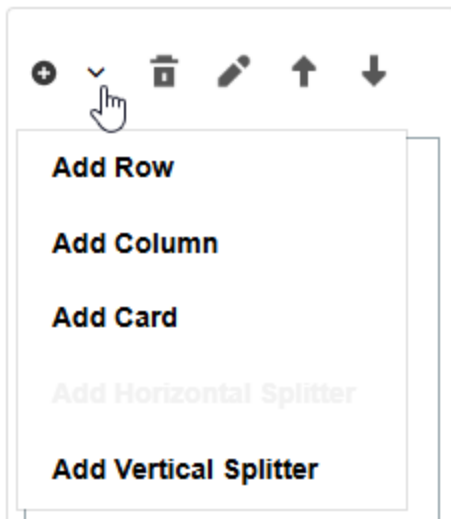


Release Notes

The theme for this Minor release is enhancements to streamline dashboard configuration, enable real-time layout personalization, and improve content visibility through contextual information.

Enhancements

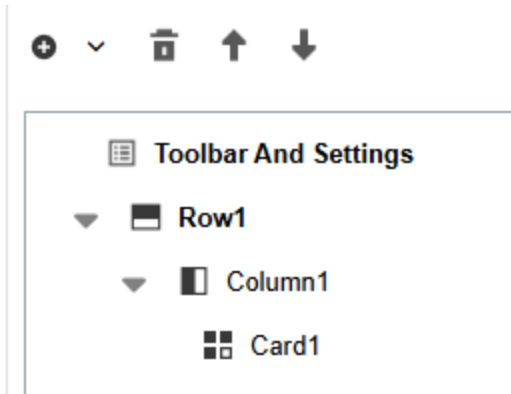
- Separate Add Row and Add Card buttons are consolidated into a single expandable menu that also includes the new Add Column and Add Splitter options, grouping all add actions together and reducing toolbar clutter. (GEN1-1928)



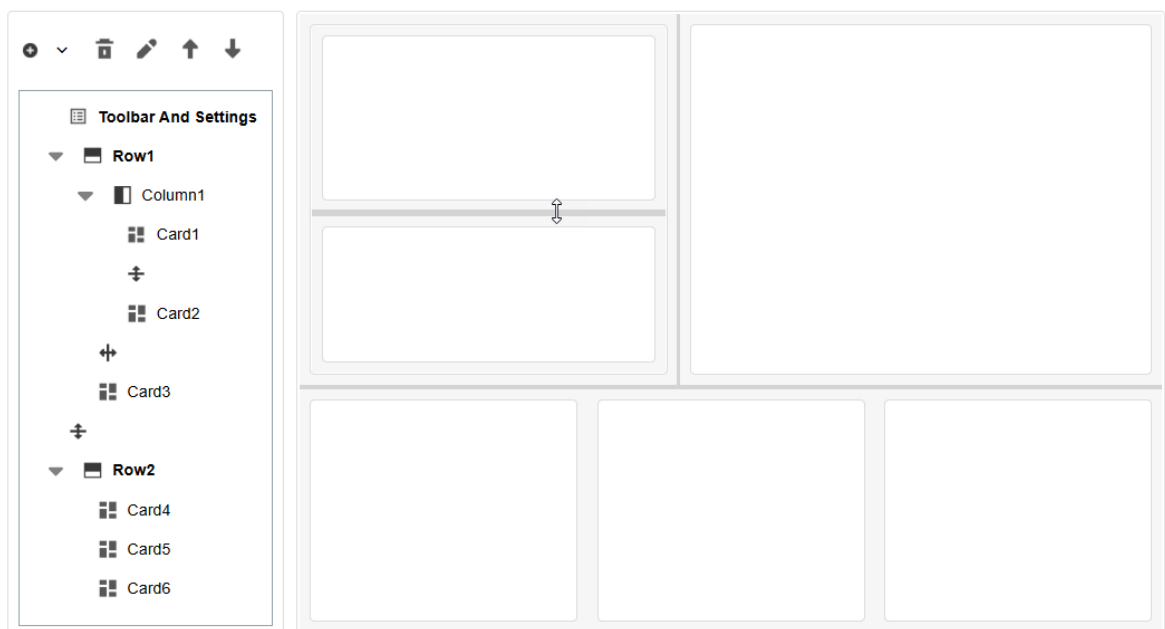
- Add a column directly from the menu in the toolbar, streamlining your workflow by removing the steps to create a card and change its type. Column label also clarifies what is being created, compared to the previous parent card and standard card terminology. (GEN1-1928)

Release Notes

- Updated the icons for row, column (previously parent card), and card, so each layout object is easier to distinguish at a glance in the navigation tree. (GEN1-1928)



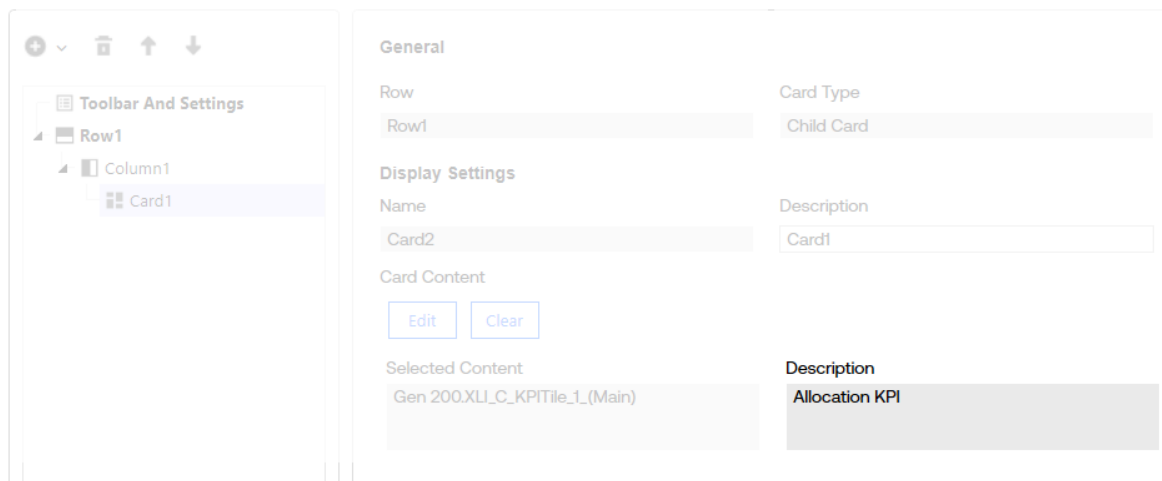
- Enable end users to customize their dashboard experience with movable vertical and horizontal splitters between rows, columns, and cards. You can simply drag the splitters horizontally or vertically to instantly refine layout, maximize visibility, and create a personalized view. (GEN1-1929)



Release Notes

- Card properties display the custom description for an injected Content Block, if one has been set, alongside its system-assigned name, for example, Buttons_1. The custom description makes it easier to identify a Content Block on the Content Management page. (GEN1-2813)

Advanced Dashboard Layouts Configuration



The screenshot displays the configuration interface for an Advanced Dashboard Layout. On the left, a tree view shows the hierarchy: 'Toolbar And Settings' (with a plus icon), 'Row1' (with a minus icon), 'Column1' (with a minus icon), and 'Card1' (selected, with a plus icon). On the right, the configuration panel for 'Card1' is shown. It includes a 'General' section with 'Row' set to 'Row1' and 'Card Type' set to 'Child Card'. The 'Display Settings' section has 'Name' set to 'Card2' and 'Description' set to 'Card1'. Below this is the 'Card Content' section with 'Edit' and 'Clear' buttons. The 'Selected Content' section shows 'Gen 200.XLI_C_KPITile_1(Main)'. Finally, the 'Description' section shows 'Allocation KPI'.

Fixed Issues

- Fixed an issue where Advanced Dashboard Layouts failed to render and returned a GetFilteredWorkspaces error when the Everyone security group was assigned to a sharable workspace. (GEN1-3143)

Upgrade Information

- To upgrade a Content Block, see [Upgrade the Content Block](#).

Compatibility

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 2.0.0 is required.

Known Issues

- Scrollable pages may have issues with BI Viewer Pie Charts in Platform Version 9.1.

Contact Support

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Dependencies

Confirm your environment meets the following requirements before proceeding.

Component	Minimum Version Required	Notes
OneStream Platform	9.0.0	OneStream recommends upgrading to the latest platform version.
Genesis	2.0.0	

Prerequisites

Review these security requirements.

Action	Requirement
Import a Content Block into the local library	You must a member of the Administrators system security group.
Inject, configure, and upgrade a Content Block	You must meet the requirements for the Designer role in Genesis. See "Genesis Security Requirements" in the Genesis Guide .

Set Up the Content Block

Follow the guidance in these sections to set up the Content Block:

- [Configure the Content Library](#)
- [Inject the Content Block](#)

Configure the Content Library

These are the sources for the Content Library:

- **Exchange Store:** A centralized registry and distribution service for Content Blocks. It is a cloud marketplace connected to Genesis that enables you to browse an up-to-date library of Content Blocks.

The Exchange Store is available to cloud-hosted environments except FedRAMP environments. It is turned off by default.

See "Enable Live Connection to the Exchange Store" in the [Genesis Guide](#).

- **Genesis Instance Workspace:** A library of Content Blocks stored within the Genesis Workspace that is managed by administrators. Content Blocks are manually downloaded from OneStream Solution Exchange and imported into Genesis. This source does not require integration with the centralized library service.

The Genesis Instance Workspace is available to all environments. It is required for on-premises environments and FedRAMP cloud environments.

See "Import a Content Block to Local Content Library" in the [Genesis Guide](#).

Inject the Content Block

A Content Block can be injected as a stand-alone item in Content Management or added to a specific Page in Navigation. It must be injected into a Page to be visible in Genesis Navigation for end users.

- **Stand-alone Item:** You can inject the Content Block in Content Management using the Inject Content Block icon, then add it to a Page in Navigation using the Link an Existing Content Item from a Shared Workspace icon.

See "Inject a Content Block" in the [Genesis Guide](#).

- **Inject into a Page:** You can inject the Content Block into a Page in Navigation using the Inject a New Basic Library Content Item icon.

See "Inject a New Content Block" in the [Genesis Guide](#).

Upgrade the Content Block

To upgrade this Content Block, ensure the following compatibility requirements are met:

- Minimum platform version required by the Content Block
- Minimum Genesis version required by the Content Block
- Current Content Block Version is 2.0.0 or later

When all requirements are met, follow the standard upgrade process. See [Standard Process to Upgrade a Content Block](#).

To upgrade an injected Content Block that is earlier than Version 2.0.0, you must first complete a one-time migration. See [One-time Migration: Content Block Version 1.x.x to 2.0.0](#). This is only required once for each injected Content Block. Then, future upgrades use the standard process.

Standard Process to Upgrade a Content Block

1. Go to **Dashboards > Genesis Designer > Genesis Designer > Designer Home > Content Management**.
2. Select **Upgrade**.

Content Management



Upgrade

3. In the **Upgrade Content Blocks** slide-out panel, by default, each injected Content Block available for upgrade is displayed, organized by type. Review upgrade availability.
4. In the row for the Content Block, select the **Upgrade** button.
5. In the **Confirm** slide-out panel, select the **Confirm** button.

For more information, see "Upgrade Content Blocks" in the [Genesis Guide](#).

One-time Migration: Content Block Version 1.x.x to 2.0.0

This migration is required for injected Content Blocks that are earlier than Version 2.0.0. Upgradability is functionality built into the Content Block starting in Version 2.0.0. Earlier versions do not include this functionality and cannot be upgraded using the standard process. This migration is a one-time process. All future upgrades can be performed directly within Genesis using the standard process.

You must complete this process for each injected Content Block to migrate:

1. Create a new Page. Edit the Visibility Settings to hide it.
2. Inject the 2.0.0 Version of the Advanced Dashboard Layouts Content Block on the new Page. Configure the settings to align with the original Content Block to migrate. The 2.0.0 Version of the Content Block will replace the original version.
3. Verify the 2.0.0 Version Content Block functionality to ensure it can replace the original Content Block.
4. Edit the Visibility Settings for the original Content Block to hide it.
5. Edit the Visibility Settings for the 2.0.0 Version Content Block to display it.

Upgrade the Content Block

6. Confirm with end users that the 2.0.0 Version Content Block functions correctly. Then, delete the original Content Block and Page.

After the Content Block has been migrated to Version 2.0.0, you can upgrade using the standard process. See [Standard Process to Upgrade a Content Block](#).

Configure the Content Block on the Designer Tab

To configure the Content Block, see the guidance in the following sections:

- [Display Mode](#)
- [Toolbar and Settings](#)
- [Layout](#)

Display Mode

Choose how content displays in the Designer tab while you configure the layout. You can switch modes at any time while working to preview content or work more quickly depending on the configuration.

- **Designer Only:** In this view, the navigation tree is visible at all times, including while configuring an item, which enables you move between items quickly without waiting for content to re-render. This option is recommended for large analytics dashboards to avoid re-rendering the content with every change.

Configure the Content Block on the Designer Tab

Designer

Content

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Advanced Dashboard Layouts Configuration

Display Mode

Designer Only

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▼

🗑️

⬆️

⬇️

📄 Toolbar And Settings

▼

📄 Row1

📄 Card1

⬆️

▼

📄 Column1

📄 Card3

⬆️

📄 Card4

⬆️

📄 Row2

General

Row

Row1

Display Settings

Name

Card1

Description

Card1

Card Content

Link

Add

Formatting

Enable Padding

True

Enable Border

True

Card Width

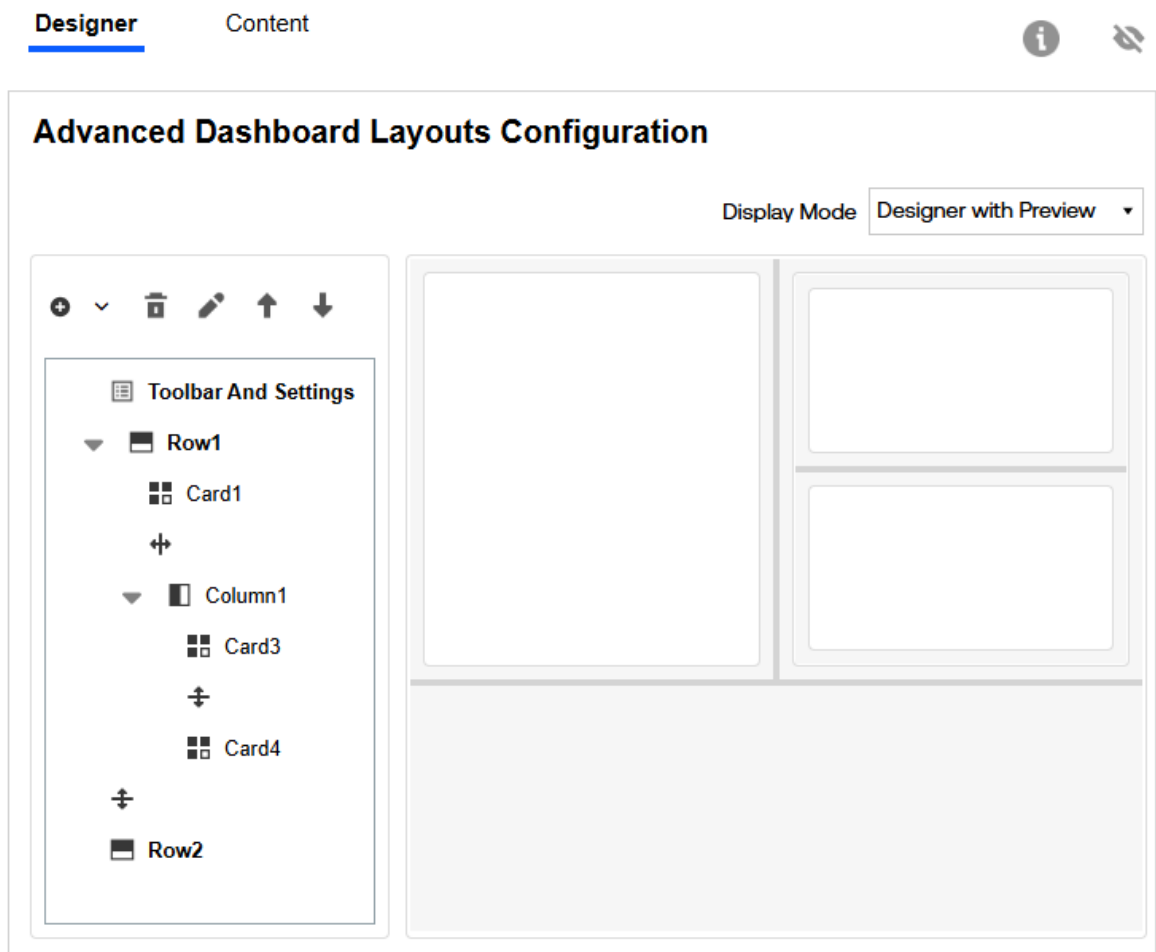
*

Save

- **Designer with Preview:** In this view, the navigation tree displays with a preview of the configured layout and content. When you select an item to configure and then select Edit, the navigation tree is replaced by the configuration form for that item. This option is recommended preview the content while you edit.

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Toolbar and Settings

In the navigation tree, select **Toolbar And Settings** to configure the properties for these elements:

- The toolbar that displays at the top of the dashboard for end users
- Dashboard-wide display properties, for example, background color and pages that scroll or condense content into a single view

Configure the Content Block on the Designer Tab

Designer Content

Advanced Dashboard Layouts Configuration

Display Mode Designer Only

 **Toolbar And Settings**

Tool Bar
Tool Bar Mode ☒ Title ☐ Tool Bar
Title
Content
Background Color
Page Type Single Page
Content

Reset Content Block

Save

- **Tool Bar Mode:** Select the **Title** radio button to display a heading with only a title. Select the **Tool Bar** radio button to add toolbar content, for example, a toolbar Content Block with filters and buttons.
- **Title** (Title only): Enter the title to display as a heading in the toolbar.
- **Toolbar Height** (Tool Bar only): Enter a fixed height in number of pixels, or enter **Auto** to let the system adjust the height dynamically based on content.
- **Manage Content** (Tool Bar only): Choose one of the following methods to populate the toolbar. You can use either method, but not both at the same time.

Configure the Content Block on the Designer Tab

- Select the **Link** button to link content from an existing dashboard.

After a dashboard is linked, you can select the Clear button to remove it from the Content Block.

- Select the **Add** button to inject a Content Block. It is recommended to use only the Toolbar Embedded Content Block.

After a Content Block is added, you can select the Edit button to update it. You can select the Clear button to either detach it from the Content Block or permanently delete it.

- **Background Color:** Default background color is gray, which is recommended for consistency with toolbar Content Blocks. To customize, enter a hex color code in the format #FFxxxxxx or a standard OneStream color name.
- **Page Type:** From the drop-down menu, select **Single Page** to display the content as a single-page canvas or **Scrollable** to display a scrollable newsfeed-style dashboard.
- **Reset Content Block:** Select this button to revert the Content Block back to its default settings.

IMPORTANT: The Reset Content Block action is irreversible. Any customizations made to this Content Block, including toolbar and content settings, are permanently removed.

Changes are not saved automatically. You must select the Save button.

Layout

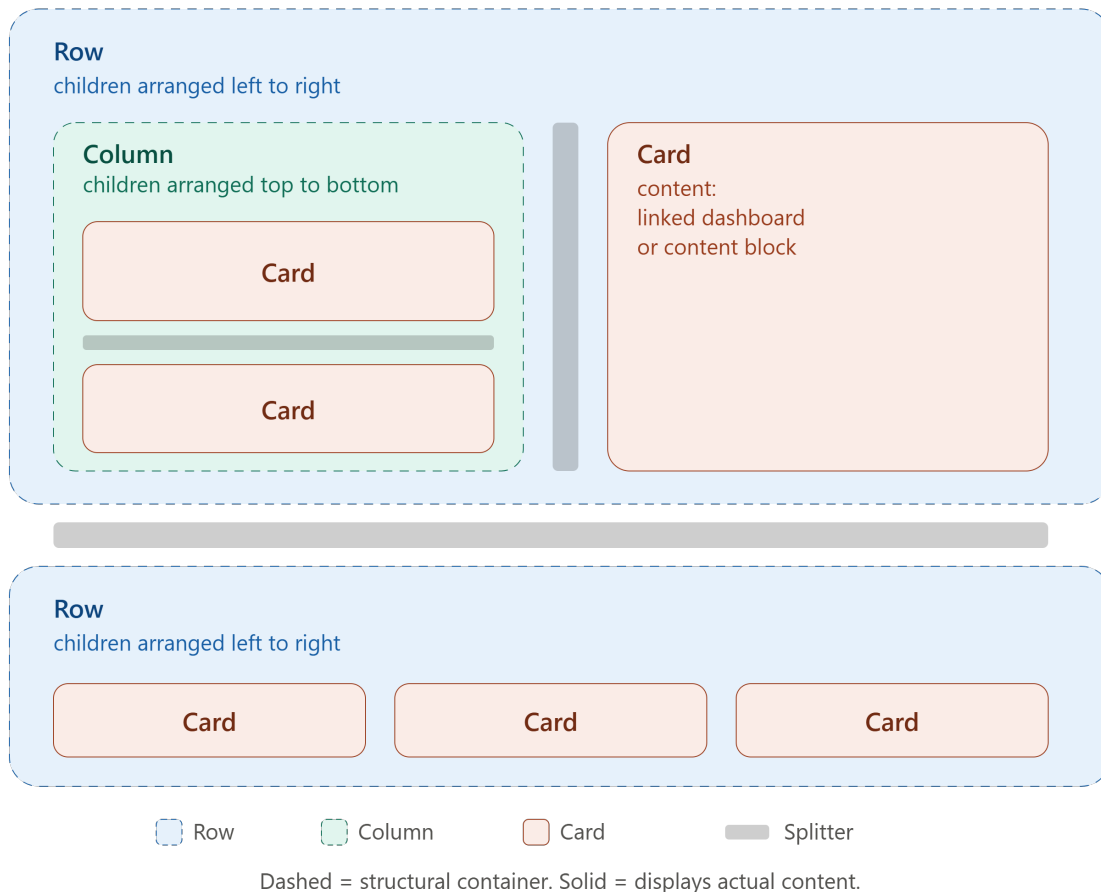
The grid layout organizes content into structured sections using these elements:

Configure the Content Block on the Designer Tab

- **Row:** A horizontal structural container that arranges its children from left to right. Rows stack top to bottom, forming the top level of the layout.
- **Column:** A vertical structural container added inside a row that arranges its children from top to bottom. Use a column to display cards vertically rather than horizontally.
- **Card:** Displays content from a linked dashboard or an injected Content Block. Only cards contain content that displays to end users.
- **Splitter:** A movable divider placed between sibling rows, columns, or cards that end users can drag horizontally or vertically to resize the space.

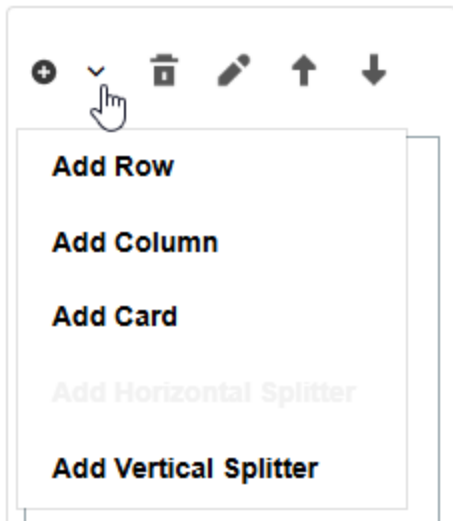
You can add up to 12 rows or splitters as top-level items. Each row or column can contain up to 12 elements of any kind.

Configure the Content Block on the Designer Tab



Designer Toolbar

In the navigation tree, use the designer toolbar to add content and organize it into structured sections in a grid layout.



The designer toolbar features the following items:

- **Context-sensitive drop-down menu:** Add rows, columns, cards, and movable splitters to the selected location in the navigation tree. Because the menu is context-sensitive, the options that display will be those available based on the current selection in the navigation tree.
- **Delete icon:** Delete the selected item in the navigation tree.
- **Edit icon:** Edit the selected item in the navigation tree. This option is available when the Display Mode is set to Designer with Preview.
- **Move Up icon:** Move the selected item up in the navigation tree.
- **Move Down icon:** Move the selected item down in the navigation tree.

Add Row

From the designer toolbar context-sensitive drop-down menu, select **Add Row** to add a row to the configuration. Then, in the navigation tree, select the row to set the properties.

Configure the Content Block on the Designer Tab

- **Description:** Enter a description to be displayed on the navigation tree to identify the purpose at a glance.

Example: KPI Tiles

- **Row Height:** Enter a fixed height in number of pixels, or enter * to let the system adjust the size dynamically based on content.

Changes are not saved automatically. You must select the Save button.

Add Column

In the navigation tree, select a row. From the designer toolbar context-sensitive drop-down menu, select **Add Column** to add a column to the configuration. Then, in the navigation tree, select the column to set the properties.

- **Description:** Enter a description to be displayed on the navigation tree to identify the purpose at a glance.

Example: Filters

- **Column Width:** Enter a fixed width in number of pixels, or enter * to let the system adjust the size dynamically based on content.

Changes are not saved automatically. You must select the Save button.

Add Card

In the navigation tree, select a row or column. From the designer toolbar context-sensitive drop-down menu, select **Add Card** to add a card to the configuration. Then, in the navigation tree, select the card to set the properties.

Configure the Content Block on the Designer Tab

- **Description:** Enter a description to be displayed on the navigation tree to identify the purpose at a glance.
- **Card Content:** Select the content for the card.
 - Select the **Link** button to link content from an existing dashboard.

After a dashboard is linked, you can select the Clear button to remove it from the Content Block.
 - Select the **Add** button to inject a Content Block. It is recommended to use only embedded Content Blocks from the Genesis Content Library or the Cube View Charts and Cube View Basic Content Blocks.

After a Content Block is added, you can select the Edit button to update it. You can select the Clear button to either detach it from the Content Block or permanently delete it.
- **Enable Padding:** Select **True** to create a margin around the content. Select **False** to turn off this feature.
- **Enable Border:** Select **True** to create a border around the content. Select **False** to turn off this feature. It is recommended to select False for Cube View Content Blocks because they have their own border.
- **Card Width** (if added in a row) or **Row Height** (if added in a column): Enter a number of pixels, or enter * to let the system adjust the size dynamically based on content.

Changes are not saved automatically. You must select the Save button.

Add Splitter

You can add a movable splitter between sibling rows, columns , and cards so that end users can drag it horizontally or vertically to customize the view.

Configure the Content Block on the Designer Tab

TIP: After moving the splitter, end users can refresh the page to return to the default height and width settings.

The context-sensitive menu displays the options available based on the current selection in the navigation tree.

- If a row is selected, Add Vertical Splitter is available to add a splitter between the children, which are columns and cards.
- If a column, Toolbar And Settings, or no item is selected, Add Horizontal Splitter is available to add a splitter between the rows at the top level or the children, which are cards.

A splitter has no configurable properties. After it is added, setup is complete.

Preview the Content Block on the Content Tab

Select the **Content** tab to see how the content will display for end users on Genesis Navigation.

Previous Release Notes

Release 2.0.0

This Major release introduces Content Block upgradability further strengthening content development and management. This capability is foundational to how Genesis content will evolve going forward.

IMPORTANT: Upgradability is only available for Content Blocks running version 2.0.0 or later. Existing Content Blocks on version 1.x must be migrated to 2.0.0 first. This is a one-time process. See [Content Block Upgrade Path](#).

Enhancements

Content Block Upgradability

This Content Block has been updated to fully support the new upgradability framework introduced in Genesis Version 2.0.0. This ensures that the Content Block can evolve over time without requiring Pages to be rebuilt or configurations to be recreated.

The following capabilities are now available for all Content Blocks at version 2.0.0 and later:

- **Version Awareness:** Content Blocks 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 Content Block 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 Content 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: This feature is not retroactive. Content Blocks on version 1.x do not include the upgradability framework. They must be migrated to 2.0.0 first. See [Content Block Upgrade Path](#).

Enhanced Content Block Lineage

Layout Content Blocks now display all injected Content Blocks in a parent/child hierarchy making it easier to identify the relationship between the content you have and where it is being used.

Compatibility

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 2.0.0 is required.
- **Genesis Version Requirement:** Content Blocks at Version 2.0.0 are only compatible with Genesis Version 2.0.0 or later.

Do not inject a Version 2.0.0 Content Block into a Genesis 1.x Instance. The Content Block will not function, and the upgradability features will not be available.

Content Block Upgrade Path

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

This process applies only to Content Blocks currently on version 1.x. Follow these steps one time to move your existing Content Block up to version 2.0.

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

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

Why is this still required for Version 2.0?

Content Block upgradability is functionality built into the 2.0.0 Content Block itself. Content Blocks on version 1.x do not include this functionality and therefore cannot be upgraded in place. The steps in [One-time Migration: Moving an Existing Content Block to Version 2.0](#) are the final time you will need to follow this process for this Content Block.

Upgrading from Version 2.0.0 to Future Versions

Once a Content Block is running Version 2.0.0 or later, upgrades are handled directly within Genesis. No Page rebuilding or reconfiguration is required.

See the [Genesis Guide](#) for more details on the Content Block upgrade process.

Known Issues

- Scrollable pages may have issues with BI Viewer Pie Charts in Platform Version 9.1.

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Release 1.1.0

This Minor release focuses on improving the visual integrity and parameter-driven interactions within Advanced Dashboard Layouts.

Fixed Issues

- **Card Border Rendering:** Resolved an issue where enabling Border Line and Padding on caused the background color to bleed into the card content area. This was especially noticeable with darker backgrounds.
- **Parameter Synchronization:** Resolved an issue where when multiple Content Blocks are configured to share parameters using a Toolbar Embedded Content Block, filters displayed correctly in the toolbar but triggered an unexpected platform dialog box for parameter selection.

Compatibility

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 1.0.0 is required.

Known Issues

- Scrollable pages may have issues with BI Viewer Pie Charts in Platform Version 9.1.

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Release 1.0.0

This is the initial release of the Content Block.

Compatibility

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 1.0.0 is required.

Known Issues

- Scrollable pages may have issues with BI Viewer Pie Charts in Platform Version 9.1.

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