



Buttons Content Block Guide

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	1
Use Cases	2
Release Notes	3
Enhancements	3
Fixed Issues	4
Upgrade Information	4
Compatibility	4
Contact Support	4
Dependencies	5
Prerequisites	6
Set Up the Content Block	7
Configure the Content Library	7
Inject the Content Block	8

Table of Contents

Upgrade the Content Block	9
Standard Process to Upgrade a Content Block	9
One-time Migration: Content Block Version 1.x.x to 2.0.0	10
Configure the Content Block on the Designer Tab	12
Button Style Settings	12
Button Style	13
Buttons Per Row	13
Canvas Background Color	14
Designer Toolbar	14
Button Properties	14
Preview the Content Block on the Content Tab	21
Previous Release Notes	22
Release 2.0.0	22
Enhancements	22
Compatibility	23
Contact Support	24

Table of Contents

Release 1.1.0 25

 Enhancements 25

 Compatibility 25

 Contact Support 25

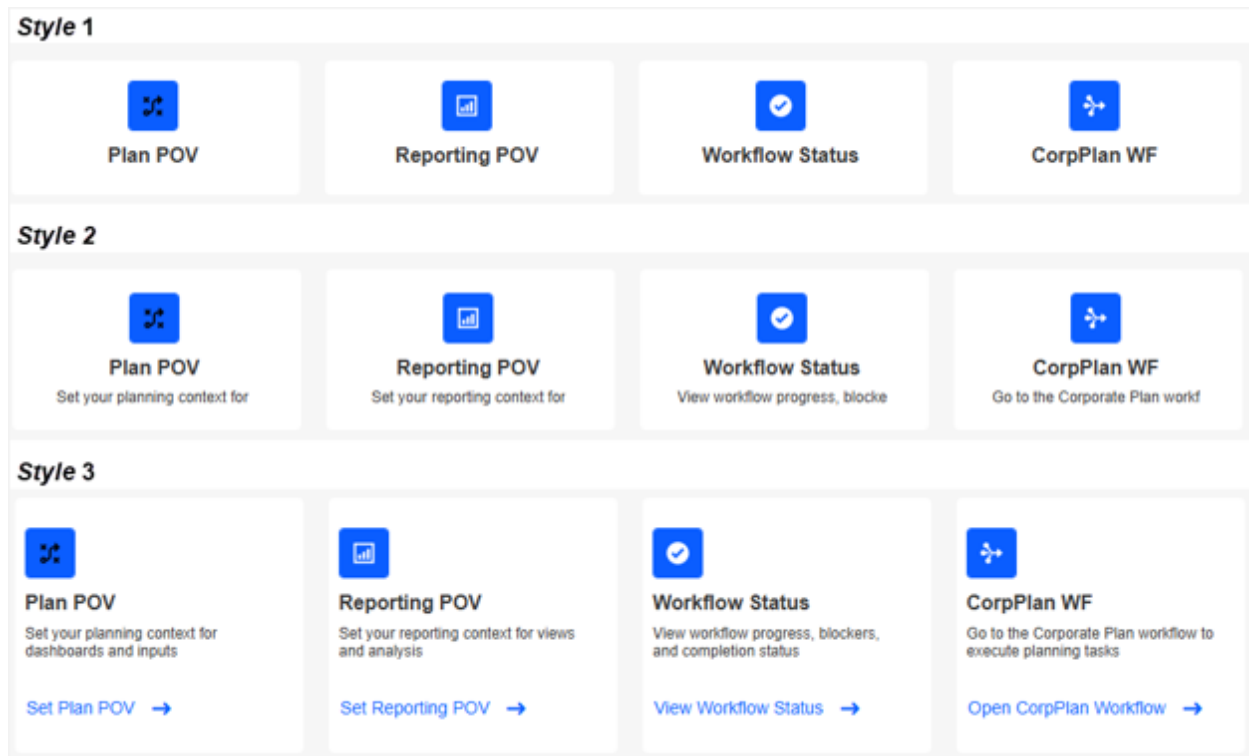
Release 1.0.0 26

 Compatibility 26

 Contact Support 26

Overview

The Buttons Content Block enables configuration of multiple buttons that activate POV changes and navigation actions. Buttons are rendered in a grid-based layout to provide a clean and organized user experience. Each button completes its configured actions when selected by the user.



Use Cases

Add the Buttons Content Block to a toolbar embedded with other user process content to complete the following actions:

- Change POV to complete workflow tasks
- Change POV for reporting and accurate data analysis
- Navigate to a workflow or dashboard

Add the Buttons Content Block to a navigation hub embedded in a central landing page or home page to complete the following actions:

- Navigate to various OneStream application pages
- Navigate to a workflow

Release Notes

The theme of this Minor release is enhancements designed to help users reach the right information more efficiently. Dynamic POV values and additional navigation options make it easier to land on the right data and stay in context while working.

Enhancements

- **Dynamic Workflow and Cube POV Values:** Buttons that set the Workflow POV or Cube POV accept dynamic values. Use parameters (~|ParamName|~) or substitution variables (~SubVarName~) in the Genesis syntax, and the POV resolves when the user selects the button instead of being fixed at design time. This enables you to set the POV from a value maintained elsewhere so users land on the right data. (GEN1-3138)
- **Navigate to Cube View, File, and URL:** In addition to dashboards and workflows, buttons can open a Cube View, file, or URL. This enables users to efficiently access related reports, documents, and external resources. (GEN1-2859)
- **Open Pages in a New Tab (Windows Application Only):** When a button navigates to a OneStream page (dashboard, Cube View, or workflow), you can choose to open it in a new tab. Users keep their current page open and do not lose their place. This option is available only in the Windows application. (GEN1-2859)
- **Open files in the OneStream Viewer:** Buttons that open a file can display it in the OneStream Viewer instead of the default application for the file, so users can view the file without leaving OneStream. This option is available only for file types supported by the OneStream Viewer. (GEN1-2859)

Fixed Issues

- Previously, deleting a button that had other buttons below it left the properties of the deleted button displayed, and saving overwrote the newly selected button. This issue has been fixed. (GEN1-2449)

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.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)

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 Content Blocks, 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 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:

- [Button Style Settings](#)
- [Designer Toolbar](#)
- [Button Properties](#)

Button Style Settings

Update the settings at the top of the page. These settings apply to all buttons and the rendered page.

Button Style
☒ Image and Title ☐ Image, Title, and Subtitle ☐ Image, Title, Subtitle, and Navigation Link

Buttons Per Row
4 ▼

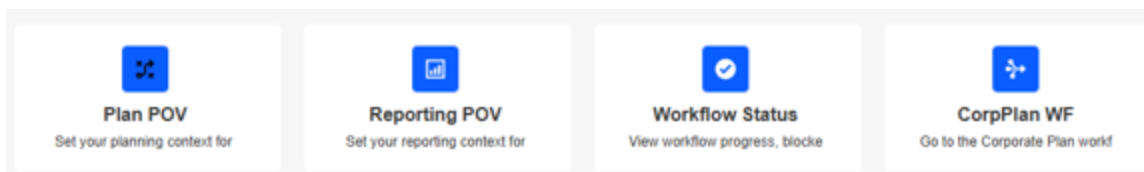
Canvas Background Color
#FFF6F6F6

Button Style

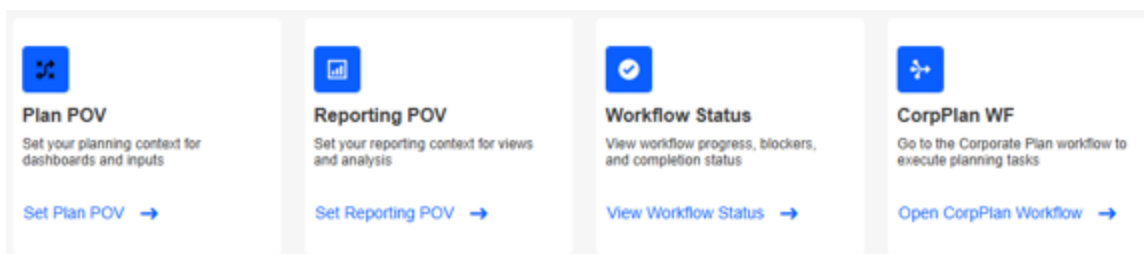
- **Image and Title:** Select to display an image and a title, which is optional.



- **Image, Title, and Subtitle:** Select to also display a subtitle below the title.



- **Image, Title, Subtitle, and Navigation Link:** Select to also display a link below the subtitle.



Buttons Per Row

Select the number of buttons to display in a single row before wrapping to the next line.

Example: If six buttons exist and the Buttons Per Row drop-down menu is set to two, buttons wrap after every two rows. If six buttons exist and the Buttons Per Row drop-down menu is set to six or more, all buttons display in a single row.

Canvas Background Color

Set the background color of the canvas containing the buttons. Enter a standard OneStream color name or a hex color value in the format #FFxxxxxx.

Designer Toolbar

Use the designer toolbar above the button list to add, delete, and reorder buttons.



- To add a button, select the plus sign icon.
- To delete a button, in the list, select the button. Then, select the trash can icon.
- To reorder a button, in the list, select the button. Then select the up or down arrow to move the button.

Button Properties

In the list, select a button to manage properties.

Configure the Content Block on the Designer Tab

Button Properties

Title	Button1
Title Text Color	#FF373737
Subtitle	
Subtitle Text Color	#FF373737
Image	Library_General_White_Compass.png ▼
Image Background Color	#FF0A5DFF
Image Preview	
Hover Color	#FFC8C8C8
Security Group	Everyone ▼
Navigation Text	
Navigation Text Color	#FF0A5DFF
Set Workflow POV	☐ Yes ☒ No
Set Cube POV	☐ Yes ☒ No
Navigation	☐ Yes ☒ No

NOTE: Property availability depends on the selected button style.

- **Title:** Enter the title to display on the button for end users and also in the list for configuration.
- **Title Text Color:** Enter the color of the title text using a standard OneStream color name or a hex color value in the format #FFxxxxxx.

Configure the Content Block on the Designer Tab

- **Subtitle** (for button styles with a subtitle): Enter the subtitle to display on the button for end users.
- **Subtitle Text Color** (for button styles with a subtitle): Enter the color of the subtitle text using a standard OneStream color name or a hex color value in the format #FFxxxxxx.
- **Image**: Select the image to display on the button for end users. Images are selected from the Genesis Image Library, including stock images and uploaded images.

TIP: Preview the image in the Image Preview.

- **Image Background Color**: Enter the background color for the image to display on the button for end users. Enter a standard OneStream color name or a hex color value in the format #FFxxxxxx.

TIP: Preview the image background color in the Image Preview.

- **Hover Color**: Enter the color to display when the end user hovers over the image or navigation text. Enter a standard OneStream color name or a hex color value in the format #FFxxxxxx.
- **Security Group**: Select the group of users that will be able to view the buttons.
- **Navigation Text** (for button styles with a navigation link): Enter the text to display in the navigation link for end users.
- **Navigation Text Color** (for button styles with a navigation link): Enter the color of the navigation text using a standard OneStream color name or a hex color value in the format #FFxxxxxx.

Configure the Content Block on the Designer Tab

- **Set Workflow POV:** Select the **Yes** radio button to change the user's current Workflow POV to the values you configure when they select the button. Enter values for any of the following elements: Workflow Profile, Scenario, or Time. Any element not specified stays unchanged in the user's current Workflow POV. To set a value dynamically using parameters and substitution variables, use Genesis syntax:

Example: ~|Parameter|~

Example: ~SubstitutionVariable~

Select the **No** radio button to turn off this feature.

- **Set Cube POV:** Select the **Yes** radio button to change the user's current Cube POV to the values you configure when they select the button. Enter values for any of the available POV dimensions. Any dimension not specified stays unchanged in the user's current Cube POV. To set a value dynamically using parameters and substitution variables, use Genesis syntax:

Example: ~|Parameter|~

Example: ~SubstitutionVariable~

Select the **No** radio button to turn off this feature.

- **Navigation:** Select the **Yes** radio button to set the location end users will navigate to when the button is selected.

Configure the Content Block on the Designer Tab

- **Navigation Action:** From this drop-down menu, select the type of location end users are directed to when the button is selected: OneStream Page, File, or URL.

OneStream Page

- **Page Type:** Select the radio button to choose the type of page: Workflow, Dashboard, or Cube View. For Dashboard or Cube View, select the ellipsis button to open a slide-out panel to choose and save the option. Alternatively, you can enter it in the name field.

IMPORTANT: To avoid issues when navigating to a dashboard or Cube View, include the Workspace name in the arguments. For dashboards, follow `XFPAGE=WorkspaceName.DashboardName`. For Cube View, follow `WorkspaceName.CubeViewName`.

Example: For Dashboard, `XFPAGE=Dashboard:WFStatusReports.0_Frame_MainWFStatus_WFStat`

Example: For Cube View, `Corporate Strategic Plan (CRPSTR).KPIDetails_OP_KPI`

- **Open In New Tab:** Select this checkbox to open the page in a new tab. This option applies only when opening a page in the Windows application.

File

Configure the Content Block on the Designer Tab

- **Source:** Select the radio button to choose the file source: Application, System, Fileshare, or Workspace.
- **Path:** Enter the path in the field. For Workspace, you can select the ellipsis button to open a slide-out panel to choose and save the option.

IMPORTANT: To avoid issues when navigating to a Workspace, include the Workspace name: `WorkspaceName.FullFileName`.

Example: For Application,
Documents/Public/MyAppDBFile.pdf

Example: For System,
Documents/Public/MySysDBFile.txt

Example: For Fileshare,
Applications/MyAppName/Outgoing/MyShareFile.txt

Example: For Workspace, Corporate Strategic
Plan (CRPSTR).Company Logo.png

- **Use OneStream Viewer If Supported:** Select this checkbox to open the file in OneStream. This option only applies when opening the file in the Windows application.

URL

- **URL:** Enter the URL in the field.

Example: <http://www.onestream.com>

Configure the Content Block on the Designer Tab

Select the **No** radio button to turn off this feature.

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

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](#).

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.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)

Release 1.1.0

Enhancements

- **Button Style:** Introduced three configurable button styles. The original title-only button has been replaced by Style 1, which provides an updated visual design and increased tile size, with additional styles supporting subtitles and navigation text.
- **Buttons per Row:** Added support for configuring how many buttons display per row, with automatic wrapping to subsequent rows.
- **Canvas Background Color:** Added support for configuring the background color of the canvas on which the buttons are displayed.
- **Button Specific Hover Color:** Added support for configuring hover color at the individual button level instead of using a global setting.
- **Button Specific Text Color:** Added support for configuring text color at the individual button level rather than using a global appearance setting.

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.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)

Release 1.0.0

This is the initial release of the Buttons 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.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)