



# Cube Commentary Guide

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**Block Version: 2.0.0**

**Minimum Genesis Version: 2.0.0**

**Minimum Platform Version: 9.0.0**

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# Overview

The Cube Commentary content block is used for commentary analysis. The commentary configuration provides options to enter comments and analyze them in a variety of ways such as a summary or aggregated view. Enhance this analysis with AI to summarize and review detailed commentary or data.

This block contains three content cards for viewing or interacting with commentary, such as Annotations or Variance Explanations. The first card displays a single text box showing all comments defined by the member script and summary filter configurations in the Designer. The second card presents a table of comments along with a text box that allows users to edit a selected entry. The third, optional card provides a chat-style interface for generating AI analysis and is available only if an AI Services package has been purchased.

## Use Cases

- **Cube Commentary Management and Review**
  - Edit existing OneStream commentary such as variance explanations, annotations, and footnotes in a rich text format.
  - View and analyze aggregated commentary across a Parent Entity to understand trends, drivers, and areas requiring attention.
  - Capture and unify commentary across workflows, approvals, and reviews to support process-driven reporting.
- **AI-Driven Commentary and Variance Analysis**
  - Generate detailed analyses of commentary and variance data to highlight the most impactful business drivers.
  - Produce focused insights on business performance, planning models, and financial results for faster decision-making.
  - Create executive-ready summaries that can be saved directly back to the Cube to be leveraged in downstream reports.
  - Enable multi-language reporting by translating and summarizing commentary for global teams.

# Designer

The designer page is organized into four primary sections: **General**, **Scripts & Filters**, **Commentary Labels**, and **AI Configurations**. Each section contains settings that define Commentary behavior and determine how users interact with and consume comments. After making any changes, be sure to click **Save** so updates are applied to the Content section.

## General

The General section includes options that define whether end users can edit comments and the way they can edit them.

- **Is Editable:** If Is Editable is set to False, the Edit content card will not be available.
- **Rich Text:** If Is Editable is set to True, users will see the Rich Text option, allowing them to enter formatted text.
- **Spell Check:** When Rich Text is enabled, users can also choose to turn on Spell Check for editing comments.

**General**

Is Editable:  Rich Text:  Allow Spellcheck:

## Scripts & Filters

This section is where a user must define the scope of commentary that is visible and can be interacted with via the following fields:

- **Cell Member Script:** This script defines the intersection where the comments are entered, stored and viewed.
  - The Cube must be valid in order for the Member Script to pass validations.
- **Aggregation Filters:** The filters expand upon the Cell Member script to provide comment aggregation.
  - Enter a comma delimited list of Member Descendant filters where you want to see aggregated comments. This will display all comments related to Member hierarchy.

Use the **Member Script Builder Helper** dialog to assist in configuring the member script. Rather than relying on a single Member Filter Builder component for all dimensions, this helper provides dimension-specific options. Upon clicking save, each member selection is combined into a single script and automatically populated in the Cell Member Script text box.

**NOTE:** You can use Parameters in all comment configuration fields to make the comment POV dynamic.

**Dynamic based on Member Selection:**

- Parameters used in combo box/member selector.
- Use the same Member Parameter in the configuration scripts.

**Dynamic based on a Selected Cube View Cell:**

- Use Default Navigation Links to specify which Dimensions this applies to.
- Default Navigation Links are enabled on a Cube View by setting the property to True.
- Bound Parameters are not supported.

**Parameter Syntax:** ~|ParameterName|~

**Default Navigation Links:**

~|CubeNavLink|~, ~|EntityNavLink|~, ~|ParentNavLink|~, ~|ConsolidationNavLink|~, ~|ScenarioNavLink|~, ~|TimeNavLink|~, ~|ViewNavLink|~, ~|AccountNavLink|~, ~|FlowNavLink|~, ~|OriginNavlink|~, ~|ICNavLink|~, ~|UD1NavLink|~, ~|UD8NavLink|~

**Scripts & Filters**



Cell Member Script:

Cb#[Equipment]:P#?:E#GSE:C#USD:S#~|ScenarioNavLink|~:T#~|TimeNavLink|~:|  
V#Annotation:A#96999:F#FLWTop:O#Top:I#Top:  
U1#CCTop:U2#REGTop:U3#PRDTop:U4#CSTTop:U5#UD5Top:U6#UD6Top:  
U7#UD7Top:U8#RPTTop



Aggregation Filters:

E#GSE.DescendantsInclusive, A#96999.DescendantsInclusive



Use ~|MyParam|~ to designate your parameters and ~SubVariable~ to designate substitution variables.

## Commentary Labels

This section allows for configuration of the header or column name displayed for each comment using Dimension Member Names. This presents the comments in a more structured way making it easier for users to understand the context and relevance of each comment.

- **Comment Title Dimensions:** Enable the dimensions to display in the comment header (**View** Content Card) or as table columns (**Edit** Content Card).

### Commentary Labels

Comment Title Dimensions:

<input type="checkbox"/>	Cube
<input checked="" type="checkbox"/>	Entity
<input type="checkbox"/>	Scenario
<input type="checkbox"/>	Time
<input checked="" type="checkbox"/>	Account
<input type="checkbox"/>	Flow
<input type="checkbox"/>	Origin
<input type="checkbox"/>	IC
<input type="checkbox"/>	UD1
<input type="checkbox"/>	UD2
<input type="checkbox"/>	UD3
<input type="checkbox"/>	UD4
<input type="checkbox"/>	UD5
<input type="checkbox"/>	UD6
<input type="checkbox"/>	UD7
<input type="checkbox"/>	UD8
<input type="checkbox"/>	LastEditedUserName
<input type="checkbox"/>	LastEditedTimeStamp

## AI Configurations

The properties in this section are displayed only when all AI Services dependencies are successfully detected and validated. The following dependencies will be available for installation only if an AI Services package has been purchased:

- **AIS Plugin Cube Commentary (PCC)**
  - Installed separately via the Solution Exchange.
- **Xperiflow Business Rules (XBR)**
  - Installed separately from the AIS Dependencies Bundle via the Solution Exchange.

If all validation checks pass, the following AI configuration options will appear:

- **Variance Settings**
  - Choose the two scenarios or time periods that will be used to calculate variance for each comment in the AI-generated commentary analysis. Note, **Use Variance Data** must be set to Yes for variance data to be applied. Data must exist in both scenarios or both time periods for the variance calculations to be valid.
- **AI Output Save Location**
  - This script defines the intersection where the AI-generated commentary analysis will be saved. Ensure this intersection defines a valid annotation-type member for the View dimension.

## AI Configurations

*All AI Services dependencies have been validated. AI Analysis page is accessible.*

### Variance Settings

Use Variance Data:  Yes  No

Variance Dimension:

Scenario

Scenario 1:

Actual

Scenario 2:

Forecast3p9

### AI Output Save Location

Cell Member Script:

```
Cb#[Equipment  
Division]:P#:E#EUS01:C#USD:S#Forecast3p9:T#2025M5:V#Annotation:A#41012:F#  
FLWTop:O#BeforeAdj:I#None:U1#CC101:U2#USSW:U3#PRD110W:U4#None:U5#N  
one:U6#None:U7#None:U8#None
```



# Content Page

This section displays the fully configured **Content** page, which includes three content cards designed to view commentary, edit individual comments, and generate AI-driven analyses.

## View

Displays an aggregated collection of all commentary based on the configured Member Script and Aggregation Filters.

**GSE - 96999**Display Content: **View** ▾*Viewing comments for all members rolling up into the above intersection.***C840 - 41010:**

Revenue fell slightly as key partners delayed replenishment orders amid concerns about market contraction and rising financial exposure across their distribution networks.

**ECA01 - 41010:**

Wholesale revenue softened as several regional distributors reduced inventory positions in response to tightening credit markets and increased borrowing costs.

**EUS01 - 41010:**

High tariffs leading to high variance here.

**EUS01 - 41011:**

E-commerce performance held steady, with demand in line with recent trends. Not material enough to consider in business decisions.

**EUS01 - 41012:**

Direct sales were consistent with prior periods, reflecting normal customer ordering patterns.

**EUS01 - 41013:**

Component revenue was steady, with no material shifts in customer demand.

**EUS01 - 41014:**

Intercompany sales activity remained consistent with planned transfer volumes.

**EUS01 - 49110:**

Discount levels were in line with historical trends and aligned with current promotional activity.

## Edit

Presents all commentary in a tabular format. Users can select a row to load an individual comment into the text box below, make changes, and click **Save** to write the updated comment back to its corresponding Cube intersection.

**GSE - 96999** Display Content: **Edit** ▼

*Viewing comments for all members rolling up into the above intersection.*

Entity ▼	Account ▼	
C840	41010	Revenue fell slightly as key partners delayed replenishment orders:
ECA01	41010	Wholesale revenue softened as several regional distributors reduc
EUS01	41010	High tariffs leading to high variance here.
EUS01	41011	E-commerce performance held steady, with demand in line with r
EUS01	41012	Direct sales were consistent with prior periods, reflecting normal c
EUS01	41013	Component revenue was steady, with no material shifts in custom
EUS01	41014	Intercompany sales activity remained consistent with planned trar
EUS01	49110	Discount levels were in line with historical trends and aligned with
EUS01	49210	Bad batch of goods caused lots of returns.
EUS01	51010	Labor-related COGS remained stable, reflecting normal staffing ar

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Font ▼

Paragraph


Spelling Language

Proofing

English (United States) ▼

Spell Check

Revenue fell slightly as key partners delayed replenishment orders amid concerns about market contraction and rising financial exposure across their distribution networks.




## AI Analysis


Quickly generate narrative insights using natural language prompts. Simply enter a prompt describing the analysis or commentary to analyze, and the integrated large language model (LLM) will produce a tailored summary based on your input. Once the analysis is generated, click **Save** to write the output back to the intersection defined in the AI Save Location cell member script.

**GSE - 96999** Display Content: **AI Analysis** ▾


*Analyzing comments for all members rolling up into the above intersection (43 total).*

**Prompt** 



Summarize the key messages in my commentary and highlight the primary business drivers that explain the change in results for the selected period|



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 **AI Analysis**

During May 2025, the Equipment Division experienced revenue softness, primarily driven by delayed replenishment orders from key partners and reduced inventory positions among distributors, reflecting concerns about market contraction, tightening credit markets, and increased borrowing costs. High tariffs and a bad batch of goods contributed to significant variances, while operating expenses such as advertising, sponsorship, and exhibition costs increased due to emergency outreach efforts, unfavorable contract renegotiations, and last-minute vendor changes. Overall, the main business drivers explaining the change in results were external market pressures, supply chain disruptions, regulatory impacts, and targeted marketing responses.

*This product generates responses based on AI-generated content. We encourage you to review responses. For specific concerns please create a support case. Information will be processed in accordance with any applicable agreement(s) with OneStream and our Privacy Policy.*

## Sample Prompts

1. *"Summarize the key messages in my commentary and highlight the primary business drivers that explain the change in results for the selected period."*
2. *"What operational or business drivers are mentioned most frequently in the commentary?"*
3. *"Provide a clear and concise summary of the commentary with an emphasis on the variances that had the greatest impact on performance."*
4. *"Explain why actuals differed from forecast for this account and entity."*
5. *"Summarize the commentary by identifying the top contributors to performance for the period. Include both operational and financial factors where relevant."*

## Troubleshooting

If you are seeing in the subtitle that there are "0 total" comments being analyzed, or if you are receiving the following AI Summary response: "The dataset contains no commentary information to summarize.", then your Member Script and/or Aggregation Filters in your Cube Commentary block settings are not pointing to any intersections that contain commentary data.

To validate and remediate this:

1. Create a Quick View in the Spreadsheet page or the OneStream Excel Add-in.
2. Set your Quick View POV members to the members that you have defined in your Member Script.
3. Drag the dimensions you have defined in your Aggregation Filters into your Rows/Columns and paste in the members and expansions.
4. If you do not see any comments populating in the Quick View. Either:
  - a. Modify your POV members and/or the members, expansions, or dimensions defined in your rows and columns to find the correct data.
  - b. Comments have not been submitted to the appropriate intersections yet. Contact the OneStream Administrator for more information.
5. Once comments are visible in the Quick View based on one of the previous steps:
  - c. Transfer the modifications you made to your POV to your block's member script.
  - d. Transfer the modifications you made to your rows and column expansions to your Aggregation Filters.

# Appendix 1

## Workspace Requirements and Considerations

Workspace objects:

- Cube Views
- Parameters
- Data Management Sequences/Steps
- Business Rule Assemblies:
  - XFBRStrings
  - Dashboard Extenders

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:	<p>Same Shareable Workspace</p> <ul style="list-style-type: none"> <li>• All objects stored together</li> </ul> <p>Default Workspace</p> <ul style="list-style-type: none"> <li>• All objects stored in the Default Workspace</li> </ul> <p>Default/Shareable Workspace</p> <ul style="list-style-type: none"> <li>• Universal objects stored in Default Workspace (Parameters, Data Management Sequences)</li> <li>• Cube View stored in separate shareable Workspace</li> </ul>
Row/Column Sharing Cube View Storage:	<ul style="list-style-type: none"> <li>• Default Workspace</li> <li>• Shareable Workspace</li> </ul> <p>Must be assigned to Genesis via Shared Workspace setting Stored in the same shareable Workspace</p>
Include the Workspace Name when calling objects:	<ul style="list-style-type: none"> <li>• Calculation Details: Parameters, Assemblies or Data Management Sequences</li> </ul> <p><b>Ex:</b> {WSName.MySequenceName}{NameValuePair=WSName.ParamName}</p>

## Considerations

To ensure consistent performance and high-quality narrative output, each analysis request supports up to **500 comments**. For larger comment populations, users should refine scope using materiality, hierarchy, or driver-based filtering before generating an analysis.

# 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 1.0.0

This is the initial release of the block.

## Platform and Genesis Compatibility

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