



# Cube View AI Comments 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

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The Cube View AI Comments 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. Content cards 1 and 2 display a side-by-side view of a Cube View and an editable text box used specifically for Cube View commentary such as Annotations or Variance Explanations. The optional third content card allows you to add supplemental content such as charts or drill down analysis while performing all core interactions with the Cube View.

Filters are dynamically generated for each Parameter in the Cube View which generate Combo Boxes and/or Member selectors for dynamic Member selection.

## Use Cases

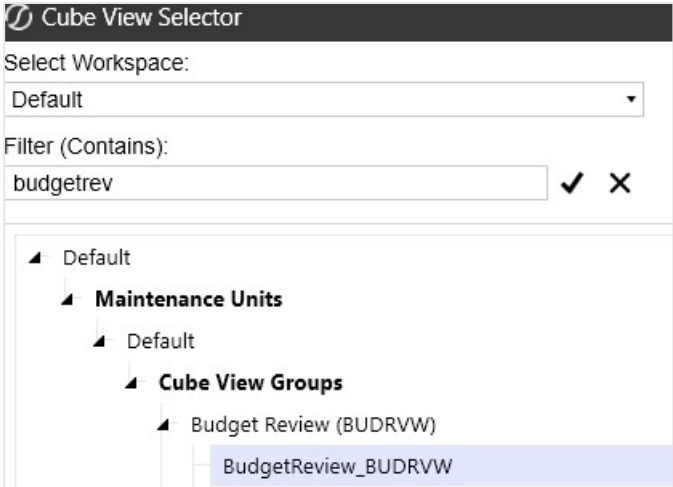
- **Cube View Commentary Data Entry and Dynamic Analysis**
  - Entering standard OneStream comments like variance explanations, annotations, footnotes, etc. in a rich text format.
  - Analyzing a summary view of all comments within the Cube View
  - Analyzing an aggregated view of the comments based on a Parent Entity.
- **Cube View Commentary Entry/Analysis with additional analysis or visualizations**
  - Displaying supplemental content to provide additional details while entering and analyzing commentary.
- **Advanced Commentary Analytics using AI**
  - Detailed commentary and data summarization
  - Focused insights on business performance, planning models, etc.

# Designer Page

The designer page is divided into five core sections: Cube View, Filters, and Buttons, Comments, Layout. The settings in each section control Cube View behaviors and capabilities and are configured based on user interaction and consumption.

## Cube View Settings

Assign a Cube View to the block. Select the Workspace where the Cube View is stored and use the Contains filters to refine your search results.

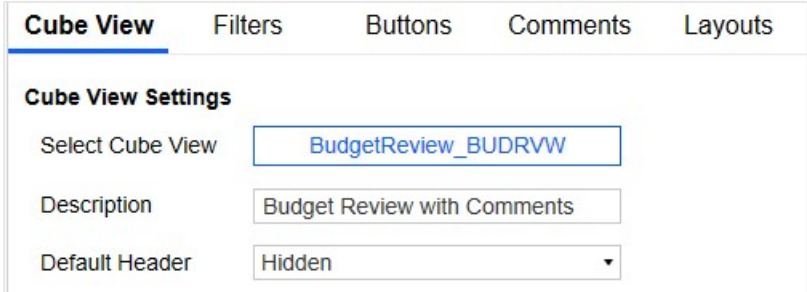


**NOTE:** Workspaces must be **shareable**, or they will not appear in the drop-down menu. Set the Shareable property to True on all applicable Workspaces; this excludes the Default Workspace.

See *Appendix 1* for more details on Workspace requirements and considerations.

The description is used as the Cube View’s main header. If the Cube View has an existing Description, it will automatically display in this field. You can modify the description or add one if desired.

The Default Header hides or displays the standard Cube View Toolbar. This is hidden by default; to display the toolbar, select Visible.



## Filters

Any Member Parameters in the Cube View will automatically be included as Filters. Literal Value and Input Parameters are excluded.

Use the Filter Options to modify:

- Description
  - This is the user prompt. If there is no description, it displays the Parameter name.
- Filter Type:
  - This determines how the user selection displays:
    - Combo Box: drop down list (default option)
    - Member Selector: Member Tree
- Display Order
- Refresh Behavior: automatically refresh after each selection or manually refresh as needed

Update Cube View Parameters:

DisplayOrder	Parameter	Description	NewDescription	ParamType	FilterType
0	prm_SelectWFEntity_BUDPRC	Select Entity		MemberList	ComboBox
1	prm_CompareScenarios_BUDPRC	Select Scenario		MemberList	ComboBox

Display Order:

Description:

Param Type:

Parameter:

New Description:

Filter Type:

[Save Settings](#) [Clear Settings](#) [Close](#)

**NOTE:** If you're using Parameters for row/column sharing, ensure the Parameter has a Default Value to avoid error upon rendering.

## Buttons

The buttons section gives you the option to include Save and/or Calculate buttons.

Cube View	Filters	<b>Buttons</b>	Comments	Layouts
<b>Save Button</b>				
Enable		True	▼	
Tool Tip		Save		
<b>Calculation Button</b>				
Enable		False	▼	

**NOTE:** Save is required if the user is entering comments. The standard Cube View save button will display if you set the Default Header to Visible, otherwise make sure to enable the Save button here.

The Calculation Action on the Calculate button can perform a Save & Calculate or a stand-alone Calculate. Calculation Type includes all standard OneStream calculation options such as Force Calculate or Consolidate, execute Dashboard Extenders, Custom Calculates or Data Management Sequences.

<b>Calculation Button</b>				
Enable		True	▼	
Tool Tip		Calculate		
Calculation Action		None	▼	
Calculation Type		Execute Data Management Sequ...	▼	
Calculation Details				
<pre>{ForecastPin.RollForecast} {prm_EntityOverview_FCST=ForecastPlan.[~  prm_EntityOverview_FCST1~1</pre>				

**NOTE:** The syntax for Parameters and Substitution Variables is different when used in Genesis.

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

**Substitution Variable Syntax:** ~SubVariableName~

Specify the Workspace Name in the calculation arguments where applicable:

- WorkspaceName.DataManagementSequenceName
- WorkspaceName.ParameterName

## Comments

Comments are both entered and reviewed via the built-in text box. Users have four ways they can interact with these comments based on the commentary configuration.

- 1) **Edit:** used to enter and/or edit comments for a selected cell.
- 2) **View:** displays the stored comment for a selected cell.
- 3) **Cube View Summary:** Provides a broader view of all comments within a Cube View based on the specified Member Filters. Displays comments for all related cells within the Member hierarchy, not just the selected cell.
- 4) **Descendants Summary:** Provides an aggregated view of comments based on the specified Member Descendants. Comments are aggregated for all related cells within the hierarchy, not just a selected cell. This is useful for providing a more detailed and inclusive view of the commentary.
- 5) **Descendants Summary (AI):** Used to provide a more focused view of your data. Type a request such as *'can you summarize all comments made across all Entities?'* and click Send. Your results will display in the text box. Click Clear Insights to remove the results.

**NOTE:** AI Commentary Results are temporary; they are not stored. To store these comments, copy and paste into data attachment or Cube View cell.

This block requires AI; AI Services must be configured before you can use this block.

The screenshot shows the 'Comments' configuration panel with the following elements:

- Navigation tabs: Cube View, Filters, Buttons, **Comments** (selected).
- Section: **Commentary Settings**
- Commentary: [Commentary Configuration](#)
- Rich Text: True
- AI Configuration** (highlighted with a red box): AI dependencies are detected. System functioning as expected.

Contact your system administrator if your AI Configuration displays an error:

The screenshot shows the 'Comments' configuration panel with the following elements:

- Navigation tabs: Cube View, Filters, Buttons, **Comments** (selected).
- Section: **Commentary Settings**
- Commentary: [Commentary Configuration](#)
- Rich Text: True
- AI Configuration** (highlighted with a red box): Dependencies Required: Xperiflow Business Rules have not been installed and are required for this content block to function properly. Please install before proceeding.

This page is where you configure and manage the commentary options as they relate to the Cube View. This is designed to enhance the way we enter, view and aggregate commentary, providing a richer and more interactive experience for users.

Cube View	Filters	Buttons	<u>Comments</u>	Layouts
<b>Commentary Settings</b>				
Commentary	<a href="#">Commentary Configuration</a>			
Rich Text	True			

Commentary Configuration is where you define:

- **Cell Member Script:** This script defines the intersection where the comments are entered, stored and viewed.
  - The View Member must be one of the standard OneStream commentary Members such as Annotation or Variance Explanation.
  - The cells do not have to be in the Cube View.
  - This essentially replaces the need for a comments column in the Cube View and improves the overall user experience.

### Commentary Configuration

**Commentary Configuration**

Cell Member Script

```
Cb#[Equip]:E#~|prm_SelectWFEntity|~  
:P#?:C#Local:S#BudgetWorking:T#2026M12:  
V#Annotation:A#~|AccountNavLink|~:F#FLWTop:  
O#Top:~|Top: U1#CCTop: U2#REGTop:U3#PRDTop:  
U4#CSTTop:U5#UD5Top:U6#UD6Top:U7#UD7Top:U8#RP  
TTop
```

- **Summary Filters:** The filters expand upon the Cell Member Script to provide the Summary View.
  - Enter a comma delimited list of Member Filters where you want to create a broader view. This will display all comments related to the Member hierarchy.
  - Typically used for showing all Accounts in a Cube View.

**Commentary Configuration**

**Commentary Configuration**

**Cell Member Script**

Cb#[Equip]:E#~|prm\_SelectWFEntity|~  
 :P#?:C#Local:S#BudgetWorking:T#2026M12:  
 V#Annotation:A#~|AccountNavLink|~:F#FLWTop:  
 O#Top:|#Top: U1#CCTop: U2#REGTop:U3#PRDTop:  
 U4#CSTTop:U5#UD5Top:U6#UD6Top:U7#UD7Top:U8#RP  
 TTop

**Summary Filters**

A#96999.DescendantsInclusive

- **Descendants Summary 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.

**Commentary Configuration**

**Commentary Configuration**

**Cell Member Script**

Cb#[Equip]:E#~|prm\_SelectWFEntity|~  
 :P#?:C#Local:S#BudgetWorking:T#2026M12:  
 V#Annotation:A#~|AccountNavLink|~:F#FLWTop:  
 O#Top:|#Top: U1#CCTop: U2#REGTop:U3#PRDTop:  
 U4#CSTTop:U5#UD5Top:U6#UD6Top:U7#UD7Top:U8#RP  
 TTop

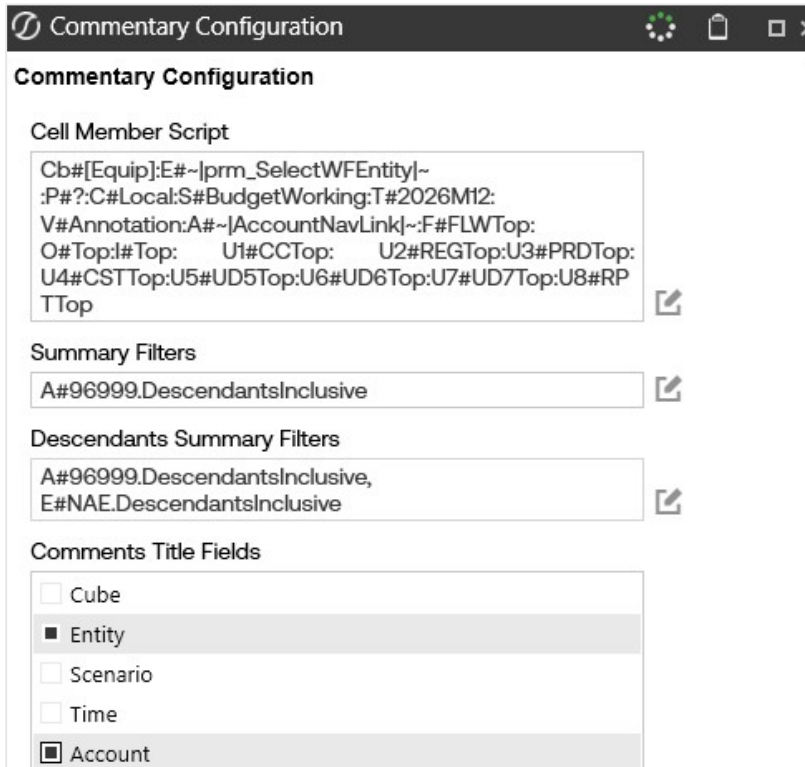
**Summary Filters**

A#96999.DescendantsInclusive

**Descendants Summary Filters**

A#96999.DescendantsInclusive,  
 E#NAE.DescendantsInclusive

- **Comments Title Field:** provides a header 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.
  - Enable the Dimensions you want included in the header.



**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 Selected Cell:**

- Use Default Navigation Links to specify which Dimensions this applies to.
- Default Navigation Links are enabled on the 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|~

## Layouts

This block contains two content cards by default (Cube View and text box) and an optional third content card. The Layouts section is where you determine how that content will display on the page by setting the width and height of each card.

Cube View	Filters	Buttons	Comments	Layouts
<b>Card 1 (Cube View)</b>				
Width	<input type="text" value="1150"/>			
Height	<input type="text" value="715"/>			
<b>Card 2 (Text Box)</b>				
Text Box Height	<input type="text" value="400"/>			
<b>Card 3 (Content)</b>				
Visibility	<input type="text" value="Show"/>			
Height	<input type="text" value="600"/>			
Manage Content	<input type="button" value="Edit"/> <input type="button" value="Clear"/>			

For **Height** and **Width** settings, enter a size in pixels. Enter \* for the element to dynamically adjust its size based on the size of its container.

**Card 3 (Content):** If you're adding more content to this page:

- Set the Visibility to Show
- Manage Content: This is where you configure the card
  - **Link:** use this to display an existing Dashboard
  - **Add:** use this to insert and configure another Content Block. Once you have added the desired block, click Edit to navigate to its configuration settings. Click Clear to remove it.
- Determine the height in relation to the card content and the rest of the page. You may need to update the sizes of all cards for ideal display.

# Content Page

This is where you can see the fully configured page. You can interact with the Cube View, Member selections and commentary options.

Select Entity <b>NA Equipment</b> ▾		Select Scenario <b>Forecast6p6</b> ▾		Comments		Descendants Summary (All) ▾	
Q	Actual 2024	Forecast6p6 2025	▶▶▶	Budget 2026	vs 2025 ... %	Type Your Request	
Wholesale	332,181,421	441,315,855	-1,284,494	38,495,643	-0.3%	Can you summarize all commentary across all Entities?	
eCommerce	166,762,164	204,544,842	983,120	17,811,143	0.5%	<input type="button" value="Send"/>	<input type="button" value="Clear Insights"/>
Direct	108,573,278	112,196,751	-269,903	9,423,879	-0.2%		
Component	69,477,404	71,608,944	431,796	6,130,366	0.6%		
Discounts	-13,789,365	-17,205,715	118,423	-1,248,323	-0.7%		
Returns	-26,432,358	-33,605,660	164,704	-2,703,449	-0.5%		
Intercompany sales	30,317,781	0	0	0	0.0%		
<b>Net revenue</b>	<b>667,090,3...</b>	<b>778,855,0...</b>	<b>143,646</b>	<b>67,909,260</b>	<b>0.0%</b>		
Cost of goods sold	114,244,721	106,482,062	-7,993,056	8,440,171	-7.0%		
<b>Gross margin</b>	<b>552,845,6...</b>	<b>672,372,9...</b>	<b>-7,849,4...</b>	<b>59,469,089</b>	<b>-1.2%</b>		
Employee salary	206,964,647	245,112,641	2,184,591	19,529,383	0.9%		
Employee benefits & other	34,422,179	40,699,837	1,788,896	3,234,669	4.6%		
Payroll taxes	28,925,457	31,388,330	1,649,509	2,458,981	5.5%		
<b>Compensation</b>	<b>270,312,2...</b>	<b>317,200,8...</b>	<b>5,622,996</b>	<b>25,223,033</b>	<b>1.8%</b>		
Research & development	7,478,844	8,451,127	-18,321	862,736	-0.2%		
Marketing & advertising	52,093,254	62,951,585	-3,382,011	4,658,715	-5.1%		
Other operating expenses	129,240,229	141,952,459	9,245,968	11,956,028	7.0%		
<b>Total operating expenses</b>	<b>459,124,6...</b>	<b>530,555,9...</b>	<b>11,468,6...</b>	<b>42,700,511</b>	<b>2.2%</b>		
Depreciation and amortization	44,416,581	50,177,447	4,804,377	3,699,713	10.6%		
<b>Total operating income</b>	<b>49,304,413</b>	<b>91,639,530</b>	<b>8,423,599</b>	<b>13,068,864</b>	<b>8.4%</b>		

Entity C840

- Revenue up 8% driven by new product lines and favorable market conditions.
- COGS increased 10% due to higher raw material prices and production costs linked to new products.
- Budget adjustments include higher shared services allocations, modifications to benefit plans to reduce costs, and a reduced tax plan.

Entity ECA01

- Revenue declined largely because of lower new memberships and reduced event participation amid economic uncertainties.
- The budget reflects plans to cut parts sold, increased travel costs, and reduced taxes.

Entity EUS01

- Comments indicate a small increase in web purchases with sales expected to grow next year, alongside higher travel costs.
- Plans include launching a new marketing campaign and expectations for improved sales performance.

Entity NAE

- Online sales are expected to show slight growth, supported by cost-saving benefit plans.

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

# Release Notes

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## 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:

- 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.
- 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.
- Selective Upgrades**  
Identify and select specific 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 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 1.1.0

The theme of this minor release is big fixes.

### Fixed Issues

- **Cube View Parameter Handling**  
When using NavLink parameters in the comments member filter (e.g., ~|ScenarioNavLink|~), Cube View parameters remain unset until the user interacts with the grid. This causes errors when attempting to view Cube View comments or request AI summaries. A validation check now ensures that each parameter has a value before

processing. If a value is missing, the system automatically applies the None member to the member filter.

- **Edit Button Hidden After Injecting a Block into a Card**

When another block was injected into the Cube View AI Comments block, the Edit button did not appear, preventing users from configuring the block. The issue has been resolved, and the Edit button now displays correctly after block injection.

## Upgrade Information

### **IMPORTANT: Upgrade Limitation for Injected Blocks**

An already injected block from a prior version cannot be upgraded to the new version.

## Recommended Actions

To use the latest version of a block:

1. Delete the existing block from the page.
2. Inject and configure the new version of the block in its place.

## Alternative Approach

If you prefer a safer transition:

1. Create a new page where the new version of the block is injected and configured.
2. Once you've verified the new block behaves as expected, delete the original page and block.

## 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 this block.

## Platform and Genesis Compatibility

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