



Document Editor

Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

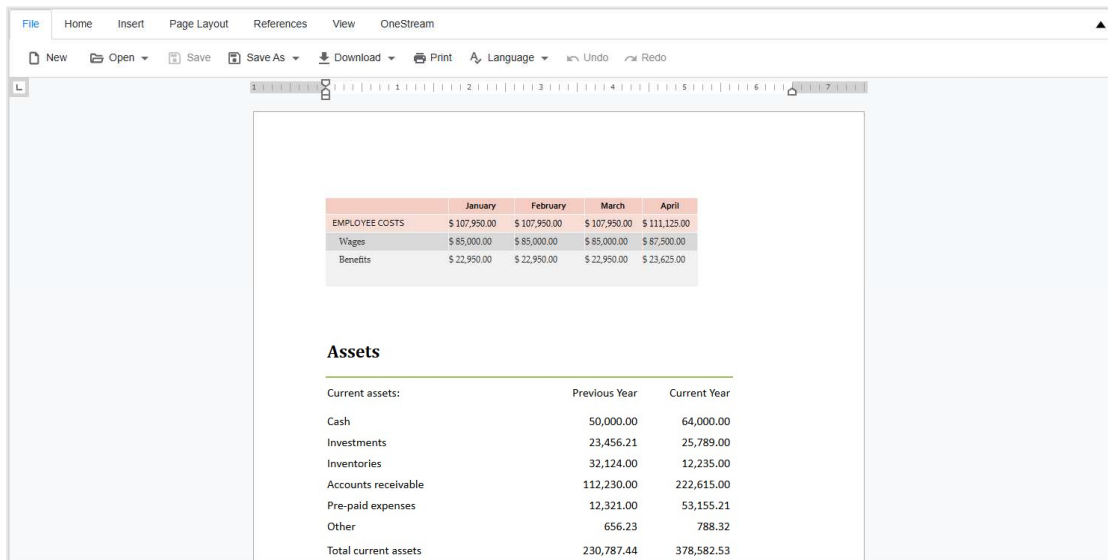
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Overview

The Document Editor Content Block displays Word and Text Files from the File Explorer and allows users to view and edit them.

If the file contains Extensible Document (XFDoc) objects such as Parameters or XFCells, it will process upon opening the file. Edits are saved back to the File Explorer.



The screenshot shows a document editor interface with a menu bar (File, Home, Insert, Page Layout, References, View, OneStream) and a toolbar (New, Open, Save, Save As, Download, Print, Language, Undo, Redo). The main content area displays two tables. The first table is titled 'EMPLOYEE COSTS' and shows data for January, February, March, and April. The second table is titled 'Assets' and shows data for Current assets, Previous Year, and Current Year.

	January	February	March	April
EMPLOYEE COSTS	\$ 107,950.00	\$ 107,950.00	\$ 107,950.00	\$ 111,125.00
Wages	\$ 85,000.00	\$ 85,000.00	\$ 85,000.00	\$ 87,500.00
Benefits	\$ 22,950.00	\$ 22,950.00	\$ 22,950.00	\$ 23,625.00

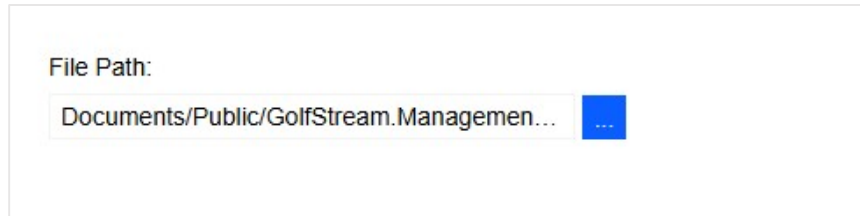
Current assets:	Previous Year	Current Year
Cash	50,000.00	64,000.00
Investments	23,456.21	25,789.00
Inventories	32,124.00	12,235.00
Accounts receivable	112,230.00	222,615.00
Pre-paid expenses	12,321.00	53,155.21
Other	656.23	788.32
Total current assets	230,787.44	378,582.53

Use Cases

- Viewing and/or editing Reports in Word such as Extensible Documents

Designer

The designer page is where you configure the file you want to display for viewing and editing purposes. Click the ellipsis in the File Path setting and browse to the File Explorer and select the file.



The image shows a configuration field for 'File Path'. The label 'File Path:' is positioned above a text input box. The input box contains the text 'Documents/Public/GolfStream.Managemen...' and a blue button with three white dots (an ellipsis) to its right, indicating a file selection interface.

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.

- 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.

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.

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 1.0.0

This is the initial release of this block.

Platform and Genesis Compatibility

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