



Dynamic Cube Wizard Content Block Guide

Block Version: 1.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

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	3
Designer Page (Configuration).....	4
Prerequisites	5
Cube Management	6
Wizard Navigation.....	7
Guided Configuration Steps	9
Step 1 - Configure Data Source	9
Step 2 - Create Model.....	10
Sub-step 1 - Define.....	11
Substep 2 - Publish.....	16
Step 3 - Analyze.....	17
Advanced Settings	18
Cube Properties.....	19
Dataset Mapping.....	20
Caching	22
Appendix	23
Configuration Guardrails	23

Overview

The Dynamic Cube Wizard Content Block guides you through every step needed to build, manage, and publish a Dynamic Cube — from connecting your data source and mapping dimensions to publishing your model and analyzing results. Each step is clearly structured, so you always know what to do next. that simplifies the creation, management, and publishing of Dynamic Cube Services. The wizard steps users through data source configuration, dimension mapping, cube model publishing, and filtered data analysis. Advanced Settings are available after publishing for additional control over cube behavior and performance.

Select or Create Dynamic Cube
Choose an existing cube to edit or create a new one to get started

Create Your Model
Create/update your cube along with Dimensions. Use advanced settings to configure additional properties and settings

Cube Name

+ Create Model

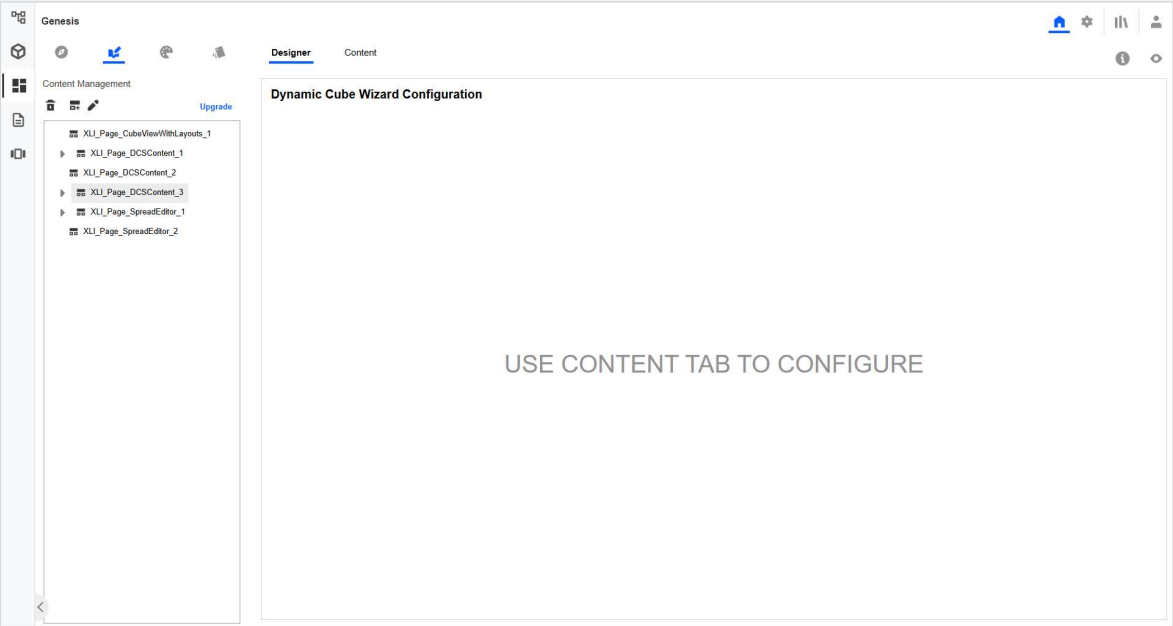
Existing Cubes

	Dynamic Projects Cube created on May 15, 2026		
	Dynamic Contracts Cube not created. May 15, 2026		
	Emissions Cube not created. May 15, 2026		
	Sales Cube not created. May 15, 2026		
	Workforce Cube not created. May 15, 2026		
	Vendors Cube not created. May 15, 2026		
	Product Attributes Cube not created. May 15, 2026		

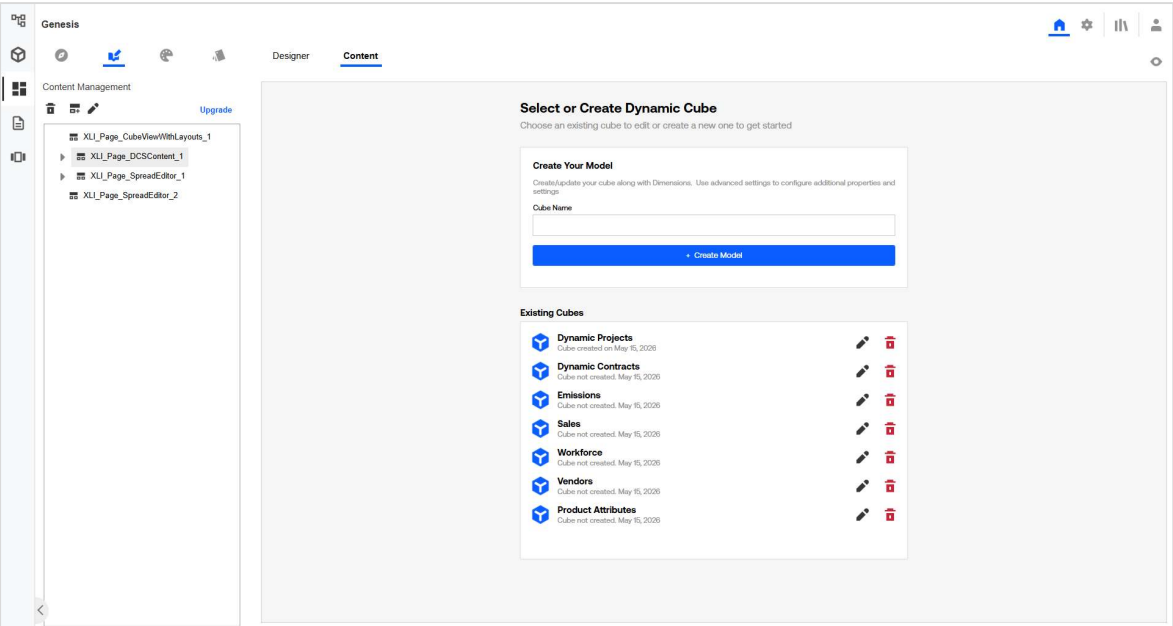
Designer Page (Configuration)

Once the block is injected, the Designer tab is intentionally disabled. All configuration for the Dynamic Cube Wizard is completed through the Content tab. This same configuration that is shown on the Content Tab can also be accessed through Genesis Navigation when the block is linked to a page, ensuring a guided and consistent setup experience.

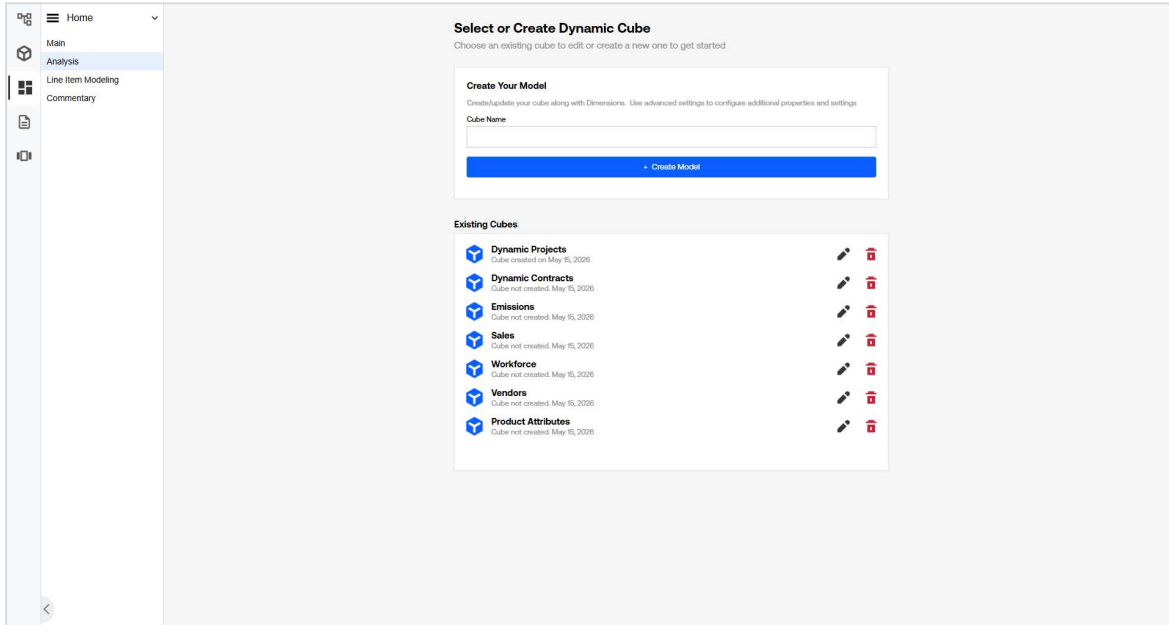
Designer Tab



Content Tab



Genesis Navigation



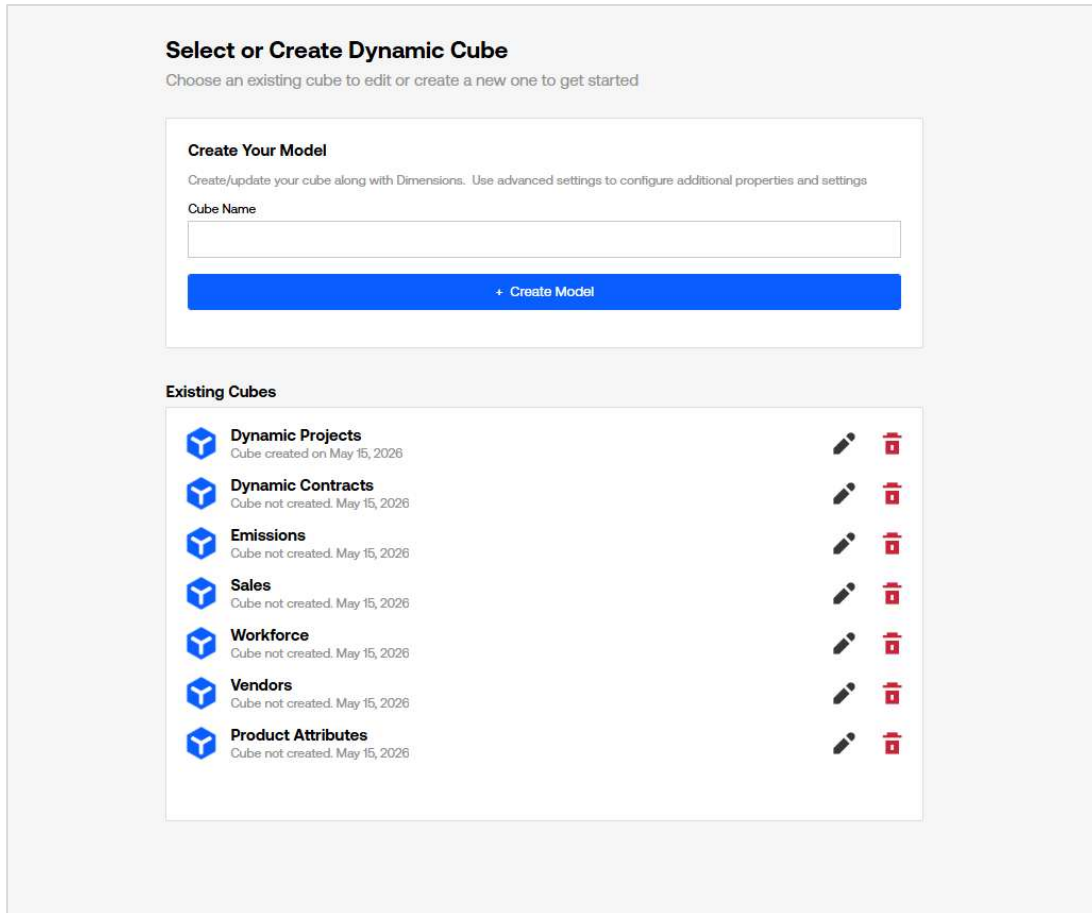
Prerequisites

Before using the Dynamic Cube Wizard Block, ensure the following requirements are met:

Requirement	Details
Enable Dynamic Cube Services	Both Dynamic Cubes and Dynamic Dimensions must be enabled in the Application Preview Feature settings. If these settings are not enabled, the wizard will not function, and an error will instruct users to contact OneStream Support.
Platform Version	Environment must be running on platform version 9.0.0 or higher.
Security Access	Users must have the required security, including workspace access and ancillary table group permissions when testing SQL or database-based functionality.

Cube Management

Cube Management is your starting point for all Dynamic Cube work. From this screen you can select an existing cube, create a new one, update cube details, or permanently remove a cube. Whichever cube you select becomes the active context — every wizard step that follows applies to that cube until you switch.



Cube Name

Shows the active cube name. When creating a new cube, enter its name here. The cube name cannot be changed after it is set and is validated against the platform's standard naming rules when you save or move forward in the wizard. See Configuration Guardrails for more.

Create Model

Starts the cube creation process using the specified cube name. Once the model is initialized, the wizard and all related panels refresh automatically.

Edit Cube

Launches the edit flow for the selected cube. The wizard refreshes to reflect the active cube and its current configuration.

Remove Cube

Prompts for confirmation before removing the active cube. Once confirmed, the cube and all associated artifacts are permanently deleted and cannot be recovered.

Existing Cubes

Displays all Dynamic Cubes created within the current Genesis block injected. Selecting a cube sets it as active and updates the breadcrumb and Cube Name field.

Active Cube Path

The Dynamic Cube Wizard operates on a single active cube at a time. All configuration steps—including data source, modeling, publishing, and analysis—apply to the active cube shown in the wizard. A breadcrumb at the top of the screen clearly indicates the current context (for example, *Cube Management* › *Active Cube Name*), and all actions apply to the cube shown there.



Users can switch cubes or create a new one by navigating back to Cube Management using the breadcrumb, without losing their place in the block. Multiple users can work in the wizard at the same time with different cubes selected. If multiple users open the same cube concurrently, an informational reminder appears to help coordinate changes and avoid conflicts.

Wizard Navigation

The Dynamic Cube Services wizard guides you through a structured, step-by-step process — from configuring your data source to publishing your cube and reviewing the results. Built-in validation ensures each step is complete before you can move forward, and completed steps are shown in blue progress status. If something needs attention, the Next button is blocked, and a message tells you exactly what to fix. The wizard stays in the current step until all issues are resolved, always keeping your configuration in a valid state.



Wizard Steps

1. Configure Data Source

Select how data is loaded into the cube, then complete the settings for your chosen input method (for example, SQL-based source data and any related options).

2. Create Model

- **Define:** Set up dimensions, dataset logic, and hierarchy or lineage rules.
- **Publish:** Build and finalize the Dynamic Cube model. Publishing must complete successfully before Analyze is available.

3. Analyze

Open the published cube in the wizard to confirm data, structure, and mappings before you depend on them elsewhere. This step is a guided first look at the cube; after publishing, you can also use standard OneStream reporting—such as Cube Views and Quick Views—for deeper or ongoing analysis.

Navigating the Wizard

Move through the wizard at your own pace using the controls below. Built-in validation keeps your configuration in a valid state, so you can focus on the work.



Moving Between Steps

Use Next and Previous to move through the wizard one step at a time or select any completed blue step or sub step in the list to open it immediately. To free up space on screen, choose Hide Steps to collapse the step panel—your place in the wizard is saved either way.

How Validation Protects Your Work

Each step checks your inputs before you advance. If something is missing or invalid — for example, an incomplete SQL query or an unmapped dimension — Next is disabled and a message points you to what needs attention. You will stay on the current step until it is resolved.

Going Back Safely

If you return to a completed step and make changes, the wizard marks affected downstream steps as incomplete and changes them back to gray until you complete them again with the updated configuration.

Guided Configuration Steps

The following sections below walk through each step of the wizard — what it does, what you can configure, and what to expect along the way. The guided configuration starts when you create a new cube or edit an existing one from the Cube Management screen. See the Cube Management section for more details.

Step 1 - Configure Data Source

The first step is to define the data source for the information you want to display in your Dynamic Cube. In this step, you connect the cube to its data source by specifying the database location and connection. You can then optionally select tables and use the schema and columns views to preview available schemas, tables, and columns so you can better understand the data before writing your SQL query. After writing the query, you can preview the results to validate that the correct data is being returned and then save the query that will feed the cube. You must save the query before you can move to the next step. See Configuration guardrails section for more information.

The screenshot shows the 'Configure Data Source' step of the wizard. The progress bar indicates the current step is 'Configure Data Source'. The interface is divided into several sections:

- Select Database Location:** A dropdown menu showing 'Application'.
- Select Table(s):** A list of tables with checkboxes, including 'AppProperty', 'Attachment', 'AuditAppProperty', 'AuditBusinessRule', 'AuditCertifyGroups', 'AuditCertifyProfileMembers', 'AuditCertifyProfiles', 'AuditCertifyQuestions', 'AuditConfirmGroups', 'AuditConfirmProfileMembers', 'AuditConfirmProfiles', 'AuditConfirmRules', 'AuditCube', 'AuditCubeDataAccess', 'AuditCubeDim', 'AuditCubeReference', 'AuditCubeViewGroup', 'AuditCubeViewItem', 'AuditCubeViewProfile', 'AuditCubeViewProfileMember', 'AuditDashboard', 'AuditDashboardAdapter', 'AuditDashboardBusinessRule', 'AuditDashboardCompAdptrMember', and 'AuditDashboardComponent'.
- Query:** A text area containing the following SQL query:

```
SELECT B.Entity, D.AccountName, A.TimePeriodLabel, A.PeriodicValue, E.PlanName,
B.Project, B.ProjectCategory, B.Status, B.Region, B.Justification, B.ProjectDescription, B.ProjectName, REPLACE(B.Vendor, ',', '') AS Vendor, CONCAT(REPLACE(B.Vendor, ',', ''), '> TotalVendors') AS VendorLineage,
B.BusinessPurpose, B.CostCenter, B.ContractType, B.ProjectPhase, B.PaymentTerms, B.BudgetCategory, B.StrategicTheme
FROM Ima1.XFW_LIM_PlanData A
JOIN Ima1.XFW_LIM_Register B ON A.RegisterLineID = B.RegisterLineID
JOIN Ima1.XFW_LIM_Formulas C ON A.FormulaID = C.FormulaID
JOIN Ima1.XFW_LIM_Accounts D ON C.AccountID = D.AccountID
JOIN Ima1.XFW_LIM_Plans E ON E.PlanID = A.PlanID
WHERE A.Year = '2026'
```
- Preview Results:** A button to view the query results.
- Result:** A table with the following columns: Entity, AccountName, TimePeriodLabel, PeriodicValue, PlanName, Project, ProjectCategory, Status, and Req. The table contains 12 rows of data.

Database Location and Connection

Select where the database is hosted and which external database connection the block should use. Changing either option refreshes the available table and column lists.

Select Table(s) and Columns

Select Tables populates a hierarchical view of database objects, allowing you to browse schemas and tables. Columns tab switches the left pane to display columns and data

types for the selected objects. Use these views together to discover table and column names to insert into your query. Both views are optional—you can write queries directly in the editor without using them—but they are especially helpful when working with an unfamiliar database.

Query

Use the Query editor on the right side of the screen to write your SQL. The block will scan for unsafe SQL patterns and confirms you have the database permissions needed to preview or save.

Preview Results

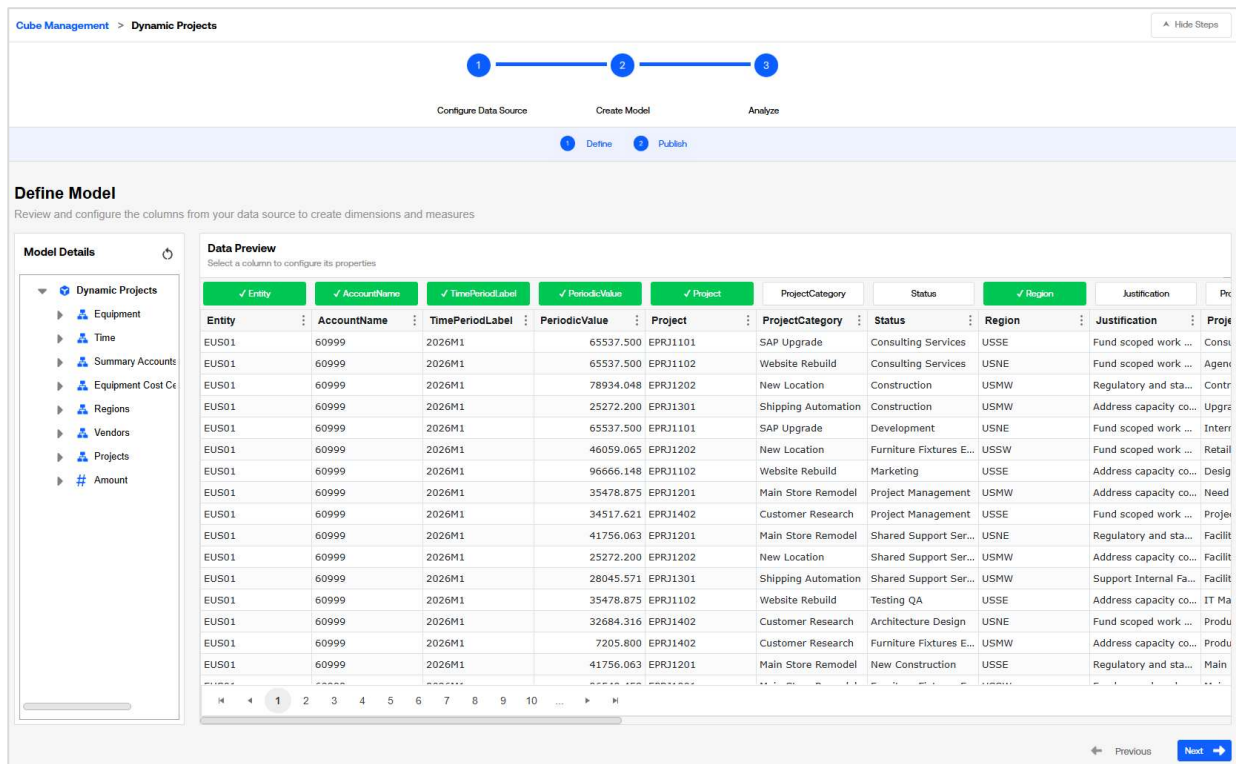
Click Preview Results below the editor to validate your query and see sample output, capped at 10 rows. This step is optional. When validation passes, the bottom pane switches to display your sample results. If validation fails, you will see a specific error message explaining what to fix. See Configuration Guardrails section for more information.

Save Your Query

Click Save in the lower right to save your query. Save runs the same checks as Preview and prepares the dataset for use in the rest of the wizard. Once saved successfully, your data source is ready to use when building and analyzing the cube. See Configuration Guardrails section for more information.

Step 2 - Create Model

Create Model is where we map source data columns to cube dimensions in the target Dynamic Cube. It includes two sub steps: Define and Publish. In Define, you configure how data columns map to dimensions, including hierarchy setup and dynamic dimension options. In Publish, you create or update the cube and make it available for analysis. Optional Advanced Settings can be used to further refine cube behavior, mapping logic, and caching.



Sub-step 1 - Define

In Define, you connect the columns from your data columns to the cube's dimensions. The wizard shows a list of columns and the dimensions they can map to. You assign each relevant source column to a cube dimension. There are three ways to configure dimension-to-column mapping:

- 1) **Map to existing members** — The source column values are matched to members that already exist in a shared dimension, such as Entity, Scenario, or Time.
- 2) **Create a dynamic dimension from a lineage column** — You provide a column that defines the parent-child hierarchy, and the wizard builds or updates the dimension from that lineage so new members can be created directly from the data.
- 3) **Create a dynamic dimension from a SQL query** — You write a SQL query that returns the dimension structure, including Parent, Child, and Description.

When defining your model, the core dimensions including Entity, Time, Scenario, and Amount should be included in your SQL query and mapped to dimensions. If any of these are missing, the wizard attempts to resolve values from the Cube POV (for Entity, Time, and Scenario), followed by the Global POV. If valid values cannot be resolved, model creation will fail. Consolidation, View, and Origin are automatically set to Local, YTD, and Import and are not configurable in the wizard.

User Dimensions (UD1–UD8) are optional. If they are not included in your dataset, you can skip the mapping step, publish the cube, and proceed to Analyze. Any User Dimensions that are not defined default to None.

In this step, you map your data columns to cube dimensions by selecting the button for the column you want to configure, which opens the properties pane. In the properties pane, you choose the appropriate settings and save your configuration. After the mapping is saved, the column appears in the tree under Model Details on the left and is marked in green with a check mark to indicate it has been configured successfully.

Model details and dimension tree

The Model Details area provides high-level, read-only context for the dynamic cube dimensions being mapped. The Dimension Tree displays the cube’s dimension structure and is the primary way to navigate and select the dimension or hierarchy branch you configured.

Remove all selections

Remove all selections (reset icon, tooltip Remove all selections) clears dimension mapping for the current cube after confirmation, restores the default dimension layout for that cube, and rolls back wizard completion for steps after Define so you must redo downstream work when you are ready.

Data preview

Data Preview displays a read-only grid of sample values from the configured dataset. Use this view to validate data types and values without editing data directly.

Column buttons (one per mapped column)

Each physical column from the dataset is represented by a dynamic button along the column axis. Clicking a column button opens the Column Properties panel and sets that

column as the active column for configuration. Button styling changes once configuration is saved.

Column properties panel

The Column Properties panel is a side panel that opens when a column is selected on the Define step. The panel header displays the selected column name and provides the primary interface for configuring how the column maps into the dynamic cube. Within this panel, you define how the column participates in the model, including the target dimension type or measure, whether the mapping creates a new dimension or reuses an existing one, associated dimension names, inheritance options, and the dimension source (for example, lineage-based or SQL-driven). When applicable, additional fields are available to configure member lineage and description columns.

The image shows a dialog box titled "ProjectCategory Properties" with a close button (X) in the top right corner. The dialog contains several configuration fields: "Target Dimension Type" (a dropdown menu), "Create New Dimension?" (a dropdown menu with "Yes" selected), "Inherited Dimension" (a dropdown menu), "New Dimension Name" (a text input field), "Dimension Source" (a dropdown menu with "Lineage Column" selected), "Member Lineage" (a dropdown menu), and "Description Column (Optional)" (a dropdown menu). At the bottom of the dialog, there are two buttons: "Clear" and "Save".

Target dimension type (Column Property Settings)

Target Dimension Type determines which dimension role or measure the selected column maps to (for example, Entity, Account, Time, Amount, or UD dimensions). This selection also controls which additional settings appear in the Column Properties pane, and refreshes controls when the type changes. After saving, the selected dimension type is considered mapped and is no longer available for selection on another column.

Create new dimension (Column Property Settings)

Create New Dimension is a Yes/No setting that determines whether the selected column maps to a new dimension or reuses an existing one. Changing this value refreshes the dependent fields so that the appropriate inputs—either existing dimension selection or new dimension name—are shown.

Existing dimension name (Column Property Settings)

Existing Dimension Name displays the list of dimensions that already exist for the selected target dimension type. This field is available when the column is configured to reuse an existing dimension.

New dimension name (Column Property Settings)

New Dimension Name is a text field used to specify the name of a new dimension when the column is configured to create one.

Inherited dimension (Column Property Settings)

Inherited Dimension lists available inherited dimension options when inheritance is supported for the selected target dimension type and dimension configuration.

Dimension source (Column Property Settings)

Dimension Source determines how members and hierarchies are created for a dynamic dimension—either directly from columns in the dataset or from a separate SQL definition.

- **Member Lineage (column-based):** Use when the hierarchy exists in the dataset. Parent-child relationships are derived from a lineage column using a delimiter (for example, Parent > Child). An optional description column may be specified.
- **SQL-defined:** Use when the hierarchy is sourced from a separate SQL query. The dimension SQL must be defined and validated before the mapping is complete.

Member lineage (Column Property Settings)

Member lineage is a field on the Define step, in the column properties panel. It tells the Dynamic Cube block which column in your main dataset holds hierarchy path text for a new dimension. Member Lineage (and Description Column (optional)) is displayed only when create new dimension is set to Yes and Dimension Source is set to Lineage column. If either setting differs, these controls are hidden because a lineage-based hierarchy does not apply.

- **One value per row:** Member Lineage is a single text string in each row of your dataset that defines the full hierarchy path for that member, from the top level down.
- **Hierarchy delimiter (>):** The > character is interpreted as “child of.” Each value between > symbols represent the next level in the hierarchy, in order.
- **Optional extended labels (:::):** You can add a longer, optional description for any hierarchy level using :::
- **Example:**

```

SELECT
  REPLACE(B.Vendor, '-', '') AS Vendor,
  CONCAT (
    REPLACE(B.Vendor, '-', ''),
    '::',
    B.Vendor,
    ' > TotalVendors'
  ) AS VendorLineage, A.PeriodicValue
FROM limal.XFW_LIM_PlanData A
JOIN limal.XFW_LIM_Register B ON A.RegisterLineID = B.RegisterLineID
JOIN limal.XFW_LIM_Formulas C ON A.FormulaID = C.FormulaID
JOIN limal.XFW_LIM_Accounts D ON C.AccountID = D.AccountID
JOIN limal.XFW_LIM_Plans E ON E.PlanID = A.PlanID
WHERE A.Year = '2026'

```

Define SQL Query (Column Property Settings)

Define SQL Query opens the dimension-specific SQL configuration dialog, separate from the main fact SQL defined on Configure. Use this option when creating a dynamic dimension through its own SQL query. The saved query must return a table that defines a parent-child hierarchy, where each row represents a single dimension member. Only supported column names (such as Parent, Child, and Description) are allowed. Each Child value must be unique across the whole result. Adding unsupported columns may cause validation errors.

- **Child** — the member's name (required; must not be blank)
- **Parent** — the immediate parent of the child (required; use the dimension root name for top-level members)
- **Description** — optional descriptive text for the member
- **Example:**

```

SELECT DISTINCT
  StrategicTheme AS Child,
  NULL AS Description,
  'TotalThemes' AS Parent
FROM lima1.XFW_LIM_register
UNION ALL
SELECT
  'TotalThemes' AS Child,
  NULL AS Description,
  'root' AS Parent

```

Description column (Column Property Settings)

Description column is the field where you pick a column from the main dataset whose values should be stored as member descriptions for the dimension you are defining. It only applies when the current Dimension source and choices expose this control.

Clear (Column Property Settings)

Selecting Clear removes the current column configuration. After clearing, the wizard refreshes and the Column Properties panel is closed.

Save (Column Property Settings)

When you select Save, the mapping is applied and the screen refreshes. Once a dimension is fully configured, the button displays a check mark next to the column name and turns green, giving you a quick visual indicator of completion. The model details and dimension tree also update to reflect the saved mapping.

Substep 2 - Publish

Publish is the second sub-step in Create Model, where you turn the completed Define configuration into an active Dynamic Cube in OneStream. This is also where you manage advanced settings for the currently selected cube. Everything on this screen applies only to the active cube shown in the wizard unless you switch to a different cube.

The screenshot displays the 'Create Your Model' wizard interface. At the top, a progress bar indicates three main steps: 'Configure Data Source', 'Create Model', and 'Analyze'. The 'Create Model' step is currently active, and within it, the 'Publish' sub-step is selected. The main content area is titled 'Create Your Model' and includes a text input field for 'Cube Name' with the value 'Dynamic Projects'. Below the input field is a blue 'Update Model' button. To the right of the input field is a gear icon labeled 'Advanced Settings'. At the bottom right of the screen, there are 'Previous' and 'Next' navigation buttons.

Create or Update model

Create or Update model is what creates a new cube or updates an existing one for the active name. The cube name is read-only on this screen, so the action always targets the cube you are configuring in the wizard.

Show and hide Advanced Settings

Advanced Settings expands or collapses the extra configuration under Publish. The behavior depends on whether the cube exists yet:

- **Before publishing** — Advanced Settings is not available. If you try to open it, the wizard prompts you to create the model first.
- **After publishing** — Use Show / Hide Advanced Settings to reveal an extra strip with deeper cube options (cube properties, dimensions, dataset mapping, caching, fixed members, and more).

Changes inside Advanced Settings often need their own Save when the UI prompts you. Once saved, run Create or Update Model again to push structural updates to the workspace. See Advanced Settings section for more information.

Step 3 - Analyze

The Analyze tab is the third step in the Dynamic Cube Wizard and provides an initial, wizard-driven experience for viewing and exploring data from a published Dynamic Cube. It allows users to configure how data is displayed and quickly analyze specific slices of the cube during setup.

This view is intended as a starting point. Once the Dynamic Cube is published, native OneStream reporting artifacts—such as Cube Views and Quick Views—can also be built directly on top of the Dynamic Cube for broader analysis and reporting scenarios.

Data Analysis
Configure dimensions and filters to analyze your cube data

Point of View (POV)
Member Filter
Cb#[Dynamic Projects]E#EUS01:ChLocalS#Forecast#P#T#2026MTV#YTD:A#60999:F#None:O#Import#None:U1#None:U2#None:U3#TotalProjects:U4#Field Focus Partners:U5#None:U6#None:U7#None:U8#None

Row Configuration
Member Filter
U4#TotalVendors:base

Column Configuration
Member Filter
T#2026:months

Analysis Results Generate Analysis

	Jan 2026	Feb 2026	Mar 2026	Apr 2026	May 2026	Jun 2026	Jul 2026	Aug 2026	Se
Canadian Consulting	336,125 USD	336,125 USD	336,125 USD	336,125 USD	336,125 USD	376,847 USD	376,847 USD	376,847 USD	
Chartco Consulting	283,739 USD	283,739 USD	283,739 USD	283,739 USD	283,739 USD	283,739 USD	494,459 USD	494,459 USD	
Coho Capital Projects	163,433 USD	163,433 USD	328,197 USD	328,197 USD	328,197 USD	328,197 USD	358,802 USD	358,802 USD	
Contoso Professional Services	358,605 USD	358,605 USD	358,605 USD	358,605 USD	358,605 USD	358,605 USD	358,605 USD	358,605 USD	
Fabrikam Engineering	443,177 USD	443,177 USD	393,661 USD	450,584 USD	450,584 USD	450,584 USD	450,584 USD	450,584 USD	
Field Focus Partners	412,263 USD	412,263 USD	412,263 USD	412,263 USD	412,263 USD	412,263 USD	587,740 USD	696,705 USD	
Golf	65,538 USD	65,538 USD	65,538 USD	65,538 USD	65,538 USD	65,538 USD	65,538 USD	65,538 USD	
Golf Components Inc	320,912 USD	320,912 USD	320,912 USD	320,912 USD	320,912 USD	320,912 USD	320,912 USD	320,912 USD	
Golf Distribution Unlimited	249,689 USD	249,689 USD	249,689 USD	249,689 USD	249,689 USD	290,410 USD	476,758 USD	476,758 USD	
Leading Brands Agency	134,944 USD	134,944 USD	134,944 USD	134,944 USD	134,944 USD	134,944 USD	134,944 USD	134,944 USD	
Litware Cloud Partners	307,285 USD	307,285 USD	307,285 USD	307,285 USD	307,285 USD	307,285 USD	531,873 USD	531,873 USD	
Marketing Inc	272,223 USD	272,223 USD	383,766 USD	383,766 USD	383,766 USD	359,939 USD	359,939 USD	359,939 USD	

Point of View (POV)

The block automatically constructs the OneStream POV (Point of View) by reading member values from the first row of the result set. You can adjust or manually set POV members as needed, then select Generate Analysis to refresh the view using the updated POV.

Row configuration

Row configuration defines which dimension expands down the left of the dynamic cube view. Use it together with POV and column settings so the table matches how you want to read the data. After you change row settings, run Generate Analysis again to refresh the grid.

Column configuration

Column configuration defines which dimension expands across the top of the dynamic cube view. It works with POV and row settings to complete the layout. Like rows, changes here take effect when you click Generate Analysis.

Member filter

Use the ellipses controls labeled as member filters. They open the member-selection experience for that context (POV vs row vs column) so you can choose members without typing long filter strings by hand. Each control only affects its own area.

Generate Analysis

Generate Analysis is the action that validates your POV and row/column filters and builds or refreshes the Cube View. Until POV, row, and column requirements are satisfied, the results area may stay empty, and you might not always get a separate pop-up—finishing those fields and clicking Generate Analysis again is the normal fix.

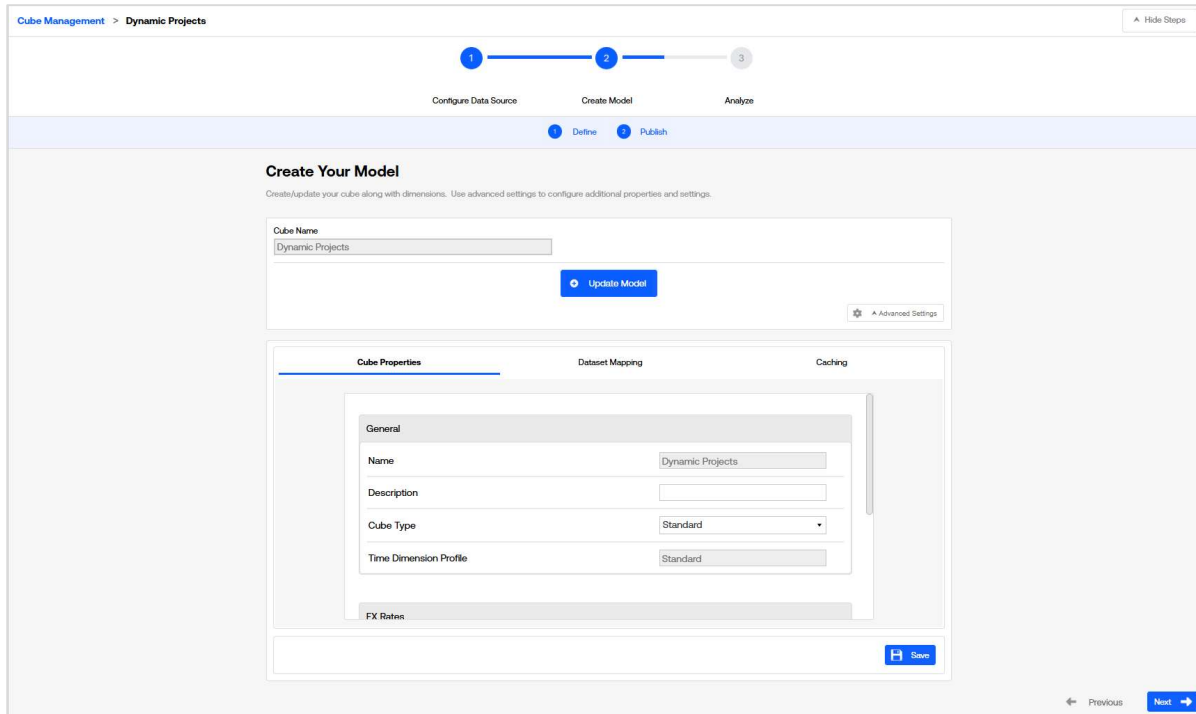
Analysis results

Analysis results are where the Dynamic Cube View appears after a successful generate. If you change POV or row/column settings, the grid updates the next time you run Generate Analysis.

NOTE: Next to the POV, row, and column configuration, the ellipses open the member filter builder and aligns with native OneStream functionality.

Advanced Settings

Advanced Settings let you fine-tune an existing Dynamic Cube — including its behavior, data mapping, refresh logic, and performance-related options. You will find them on the Publish sub-step within Create Model, available only after the cube has been created. Advanced Settings toggle between collapsed and expanded panels so Publish stays readable until you need detail.



From here, you can manage:

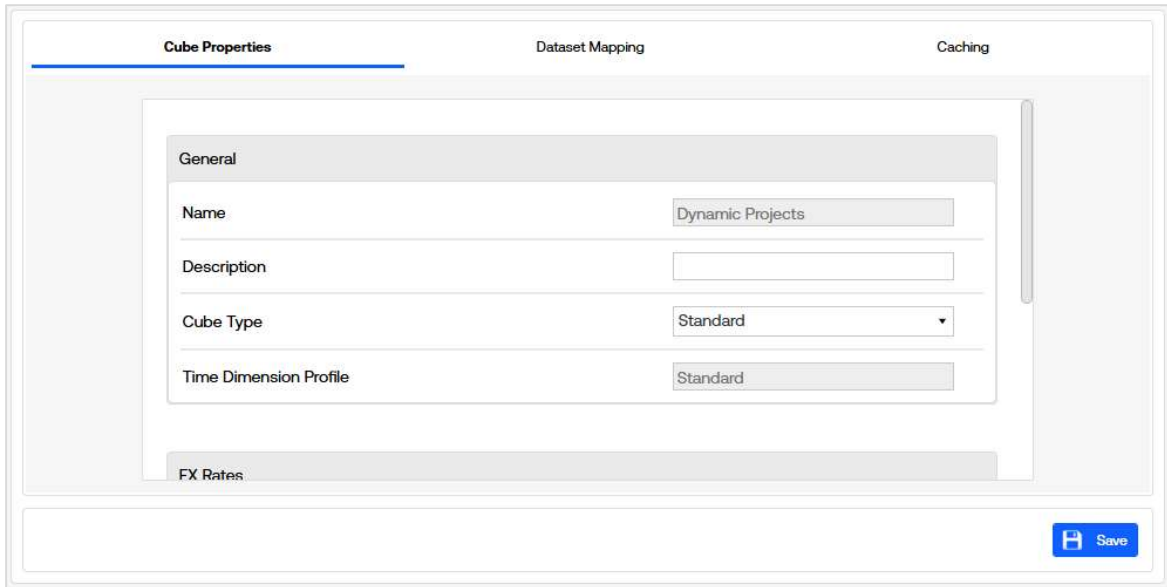
- **Cube properties** — core behavior and configuration for the cube.
- **Dataset mapping** — how source datasets are mapped into the cube.
- **Caching and refreshing** how and when cube data is refreshed.

Changes across all Advanced Settings tabs are saved together in a single action, keeping your configuration consistent. Once you have saved, run Update Model to push any structural changes to the workspace.

NOTE: After making any changes, Select Save, then run Update Model to apply changes to the cube. Changes are not reflected until these steps are completed.

Cube Properties

Cube Properties surfaces high-level cube information and configuration options. Use the General section to add a description for the cube and select the cube type. The cube name and time dimension profile are read-only and cannot be modified.



Cube name

The cube name appears for reference only and cannot be changed on this screen. After the cube is created, its name is fixed and cannot be renamed from Cube Properties.

Cube description

Use optional text that describes the cube.

Cube type

Selects the cube type from the list your solution provides. It affects how OneStream classifies and processes the cube together with your other choices—use the type your implementation guide specifies.

Time Dimension Profile

The time profile for this cube is shown for reference but is read-only. The value shown is the cube's stored time dimension profile name.

FX Rate Settings

The FX Rates section is displayed for reference. Foreign currency (FX) translations are not available out of the box and must be customized. FX related settings do not take effect unless supported by custom logic.

Dataset Mapping

You define your data earlier in the process; Dataset Mapping is where you confirm or refine how each source column maps to the cube, so imports and analysis align correctly. Your SQL query should include and map the core dimensions—Entity, Time, Scenario, and Amount. If any are missing, the wizard first tries to resolve Entity, Time, and Scenario from the Cube POV, then from the Global POV. If it cannot resolve valid values, model creation fails. Consolidation, View, and Origin are automatically set to Local, YTD, and Import and cannot be changed in the wizard. User Dimensions (UD1–UD8) are optional. If they are not included in your dataset, you can skip the mapping

step, publish the cube, and proceed to Analyze. Any User Dimensions that are not defined default to None.

Dimensions	Source Column	Fixed Value
Entity Dimension	Entity	
Scenario Dimension	PlanName	
Time Dimension	TimePeriodLabel	
Account Dimension	AccountName	
Flow Dimension	RootFlowDim	None
UD1 Dimension	RootUD1Dim	None

Source column

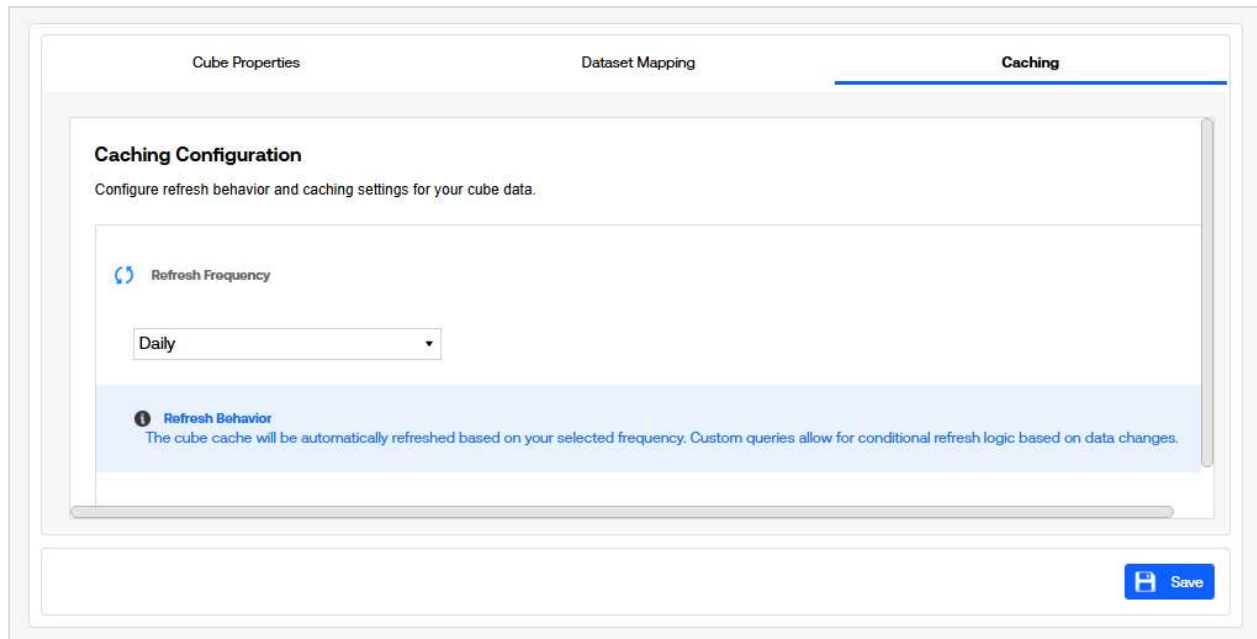
The source column maps a column in your dataset to a dimension type so that, for each row, the value in the selected column is interpreted as the member for that dimension. If the mapping was defined in a previous step, it appears as read-only in the Dataset Mapping area so you can review the active configuration without making changes. If no mapping has been defined, the column selector remains available, and the row may appear unset until a selection is made, defaulting to Root.

Fixed value

The fixed value column assigns a single OneStream member to a dimension type when that dimension is not driven by a column in your dataset. This allows the cube to consistently resolve a member for that dimension. If a column in your data was mapped to a dimension type in a previous step, that mapping appears as read-only. Otherwise, the fixed-member field remains available and defaults to None until setup is complete. Use a fixed value when the required dimension member is not defined in your query and should be applied consistently across all rows.

Caching

The Caching tab is an optional setting within Advanced Settings. This area controls refresh behavior and caching settings for the active Dynamic Cube. All changes made in this section apply only to the currently selected cube. Settings are saved with the cube when you Save from Advanced Settings and remain associated with this cube until you switch to a different one.



Refresh Frequency

Refresh Frequency controls how often the cube's cached data is refreshed. The selected interval applies to the cube and any associated dynamic dimensions, keeping refresh schedules aligned. The default setting is Daily (86,400 seconds). Choose a predefined interval from the list or select Custom to specify your own refresh interval in seconds (for example, 30 minutes = 1800).

Enter refresh frequency (custom)

When Custom is selected, the Enter Refresh Frequency field becomes available. Use this field to enter a refresh interval in seconds.

Appendix

Configuration Guardrails

The wizard validates your configuration at each step. When something needs attention, an inline message explains the issue and how to resolve it. You will remain on the current step until the issue is fixed, ensuring your cube stays in a valid state throughout setup.

Use the reference below if you encounter an error and want a quick explanation. Validations are grouped by where they appear in the wizard.

Cube Management

Validation	What Triggers It	Message
Name uses characters OneStream does not allow	You are creating a new cube and confirm a name that is not allowed as a metadata name (sometimes described as “system characters”). The following characters are not allowed and will be automatically removed from your text: /, !, @, #, \$, %, ^, &, *, (,), -, +, =, \, ?, <, >, ~, `', ", [,], {, }, . — and depending on the field, spaces may also be removed.	Error: Cube Name is not valid in OneStream. Please choose a different name without using System Characters.
Name is too long	You create a new cube, and the name is longer than 100 characters.	Error: Cube Name cannot exceed 100 characters.
That name is already used here	You create a new cube, and the block already has another dynamic cube registered under the same internal name	Error: A Cube with the name has already been created. To proceed, enter a unique Cube Name, or select Edit to modify the existing Cube.
Same name as a standard cube	You create a new cube and that name is already used by a standard (non–dynamic-cube) cube in the application.	Error: A Cube with the name already exists as a Standard Cube. To proceed, enter a unique Cube Name.
Someone else is using that name right now	You pick or create a cube while another signed-in user already has that cube name active in their own session for this block.	Warning: Active Cube is currently being used.
Name left blank	You try to continue without typing a cube name.	Please enter a Cube Name, to proceed.

Validation	What Triggers It	Message
Dynamic cubes are turned off	Your administrator has not enabled Dynamic Cube Services and Dynamic Dimensions in the application server settings.	Error: Please contact OneStream Support and ask them to Enable Dynamic Cube Services for your Environment.

Data Source Configuration

Validation	What Triggers It	Message
Empty SQL	You click Save or Preview and the SQL box is empty.	Error: SQL Query cannot be empty.
No cube selected yet	You save SQL before you have chosen or created a cube for this session.	Error: No active cube selected. Please select a cube before saving.
Not allowed to use this database (save)	You save SQL but your OneStream security groups do not include access for this database connection (ancillary / table / maintenance access, depending on setup).	Error: You do not have the required database permissions to save this SQL Query. Please contact your System Administrator.
Not allowed to use this database (preview)	You preview SQL without the same database permissions.	Error: You do not have the required database permissions to preview this SQL Query. Please contact your System Administrator.
SQL blocked for safety	You save or preview SQL and OneStream flags the statement as unsafe, like what you would see in a data adapter.	Database query error. The SQL statement contains unsafe keywords. Please review.
SQL must be a read query	Your script must begin with SELECT or with WITH (for a Common Table Expression). Only SELECT statements and CTEs are accepted.	Database query error. DCS SQL must begin with a SELECT or WITH statement.
List every column	You use SELECT * (or a similar "all columns" pattern) instead of naming columns. Naming each column explicitly lets us understand the shape of the result set up front, which is required to reliably consume, validate, and reprocess the data	Database query error. DCS SQL must list columns explicitly.

Validation	What Triggers It	Message
	— and it protects your script from breaking if the underlying schema changes.	
Sort order at the wrong level	You put ORDER BY at the outermost level of the query where the block does not allow it.	Database query error. Please remove ORDER BY from the top-level SQL Query. ORDER BY is allowed inside OVER(...) window functions and subqueries with TOP or OFFSET...FETCH.
Script contains a blocked command	The validator finds commands such as DECLARE, BEGIN, IF, WHILE GO, EXEC, INTO, or OPTION where they are not allowed.	Error. Please remove WHILE from the DCS SQL Query, to continue. The text in parentheses is the token the block found.
Query runs but the result is not usable	You save or preview and the test run fails or returns something the block cannot treat as a valid data set.	This Dataset is not valid. Please review. Sometimes followed by See Error Log for more details. when extra detail is written to the log.
Save worked	Your SQL passed checks and was saved.	SQL Query successfully saved.
Empty SQL	You click Save or Preview and the SQL box is empty.	Error: SQL Query cannot be empty.

Defining Model

Validation	What Triggers It	Message
Existing dimension not chosen	You save a column mapped to an existing dimension, but you never picked which dimension.	Error: Please Select an Existing Dimension, to continue.
New dimension name missing	You choose to create a new dimension but leave the new name blank.	Error: Please Input a Dimension Name for this New Dimension, to continue.
Member lineage column missing	You use the member-lineage option for a new dimension but do not pick which column holds the lineage text.	Error: Member Lineage cannot be empty. Please select a Member Lineage column, to proceed.

Validation	What Triggers It	Message
Member lineage data problems	You save lineage mapping and the data fails checks (for example no rows, blank values, missing the > separator, or hierarchy rules).	One of several Errors that messages errors or missing values related to your data set.
Dynamic Dimension from SQL not saved yet	You chose to drive the dimension from SQL, but you have not saved dimension SQL yet.	Error: Please create a SQL Statement for this Dimension, to proceed.
Dynamic Dimension from SQL — name missing	You try to save dimension SQL for a new dimension, but you have not entered a dimension name yet.	Error: Please enter a Dimension Name, to proceed.
Dynamic Dimension from SQL — column names wrong	Your dimension SQL returns columns that are not the names the block expects (for example Parent, Child, Description).	Error: Please rename columns to use valid column names of Parent, Child, Description.
Dynamic Dimension from SQL — required columns missing	A required column is missing from the dimension SQL result.e.g., Parent, Child, or Description	Error: Missing required columns (Child). Dynamic Dimension from SQL must return columns.
Dynamic Dimension from SQL — data does not fit the rules	The returned rows break rules for building the hierarchy (no rows; blank parent or child; parent equals child; duplicate children; invalid or reserved names).	One of several Error messages describing the specific problem.
Fact data values are not valid member names	You save mapping and values in your main SQL use characters OneStream would strip or use reserved names.	An Error: Column '...' message naming the column and the problem.
Fact data does not match the dimension	You save mapping and values in the main SQL are not valid members for the dimension you picked (or for the dimension SQL you built).	Error: Column contains N value(s) not found in dimension members
Amount column problems	You map Amount to no column, to a column that is not decimal, or you save before the main SQL and data are ready.	Starts with Error: Please select a column for Amount. Other lines may mention missing data or that Amount must be decimal.
Same column used twice	You try to map a source column that is already mapped to a different dimension.	Error: This Column is already assigned to the Dimension. Please clear original Column Dimension selection, before trying to add a new one.

Validation	What Triggers It	Message
Dimension type not chosen	You try to save mapping without picking which dimension type (or measure) you are configuring.	Error: Please Select a Dimension Type or Measure to proceed.
Resetting all mappings	You confirm clearing all dimension selections for the cube.	Dimension selections have been reset to defaults.
Advanced settings too early	You open advanced cube settings before the cube has been created in OneStream.	Please select Create Model, before accessing Advanced Settings
Custom refresh not filled in	You save advanced settings with "custom" refresh chosen but you leave the custom interval blank.	Please enter Custom Refresh Frequency value, to proceed.
Fixed member is wrong	You save advanced settings with a fixed POV member that does not exist or is not a lowest-level base (leaf) member.	Error: Fixed member '...' does not exist in the '...' dimension (...). or a message that the member must be a base (leaf) member for import.
Advanced settings saved	Your advanced settings pass validation and save.	Cube settings saved.

Analyze

Validation	What Triggers It	Message
Something missing from POV for the grid	The block validates your POV before drawing the cube view and finds the required dimension empty. (The row and column dimensions you expand in the grid are skipped in this check.)	Error → Please select a/an ... in POV section, to proceed. If the cube itself is missing Error → Please select a Cube in POV section, to proceed.
Entity not found from SQL or POV	The block reads your main SQL sample and your saved POV file and still cannot determine Entity.	Please either select an Entity in your SQL Query, or an Entity in your POV, to continue.
Scenario not found	Scenario is not in the SQL sample, not in your POV file, and there is no global scenario to fall back to.	Please either select a Scenario in your SQL Query for DCS, or a Scenario in your POV, or a Scenario in

Validation	What Triggers It	Message
		your GlobalScenario, to continue.
Time not found	Same as Scenario, for the Time dimension and global time.	Same pattern as Scenario, with Time and “Global Time” in the message.
Try generating again	A rare case after dimensions changes where a member is still not found.	Please click 'Generate Analysis', to continue.

Between wizard steps — Next, Previous, and confirmations

Validation	What Triggers It	Message
Next or Previous with no cube	You click Next or Previous before a cube is selected for this session.	Please select a cube before navigating.
Finishing a required sub-step	You click Next on a sub-step the workflow marks as mandatory to complete before leaving (default: Publish under Create model).	A confirmation window: confirm Complete or Cancel. Title asks you to confirm completing steps.
Going back past the required sub-step	You click Previous when the block would move you onto a sub-step that must stay complete.	A confirmation window: confirm Revert or Cancel.
Main SQL not saved	SQL Query must be saved before you can proceed to Step 2	Error: Please create SQL Statement, before clicking Next.
Dimension setup missing	You click Next from Step 2 · Publish and the block cannot load your saved dimension mapping.	Dimension configuration is missing. Please complete dimension mapping before proceeding.
Required dimensions incomplete	You click Next from Publish toward Analyze and Entity, Scenario, Time, or Amount (and related rules) are not satisfied.	Several lines, one per issue (setup not finished, column missing, “cannot use New” for certain dimensions, and so on).

Validation	What Triggers It	Message
Cube not created yet	You click Next on Step 3 · Analyze but the cube does not exist yet in OneStream.	Error: 'YourCubeName' does not exist. Please click 'Create Model', before clicking Next.