



Genesis Guide

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About This Guide

This guide provides information about Genesis, including the following topics:

- Overview of Application Groups, Navigation Groups, and Pages displayed in Genesis Navigation. See [Genesis Navigation](#).
- Instructions for managing Application Groups, Navigation Groups, Pages, content, libraries, instances, and images in Genesis Designer. See [Genesis Designer](#).
- Instructions for installing the solution. See [Setup and Installation](#).

This guide is intended for the following audiences:

- Users who view content
- Report designers, power users, and administrators who create, update, and manage content
- Solution administrators who install Genesis and manage libraries and instances

Genesis Overview

Genesis is a powerful no-code framework solution designed for finance professionals to quickly design and deploy new financial and operational models, launch new planning processes, and enhance reporting and analysis with ease. This solution democratizes business insights, enabling finance teams to adapt and grow without the constraints of traditional configuration processes and respond faster to the changing needs of the business.

Foundational to Genesis is the Genesis Content Library, where power users can access an ever-increasing and constantly updated library of high-value focused content (Content Blocks) that can be easily deployed with a single click and quickly configured to solve virtually any business problem.

Genesis has a plug and play architecture that features a user-friendly interface where users configure different Content Blocks to tailor the platform to their specific requirements. This intuitive approach simplifies the configuration process, making it more accessible to report designers, administrators, and power users. By minimizing the need for extensive technical expertise, Genesis empowers the finance department to take control of their processes and make informed decisions without relying heavily on IT support.

Key Benefits

- **Efficiency and Agility:** Simplified, low-code configurations enable rapid application development with minimal manual coding, which boosts agility and reduces costs.

- **Empowers the Business User:** Caters to administrators and the finance team. Ensures the solutions are closely aligned with business needs and can be easily customized by those who understand the business processes best.
- **Enhanced User Experience:** Create unique solutions tailored to specific business and user requirements with a user-friendly interface that is easy to navigate.
- **Continuous Improvement:** Provides customers with the flexibility to continuously update and improve their application. The Content Library will continue to grow based on customer needs. Applications will remain relevant and effective in meeting customer needs.
- **Scalability:** As the business grows, new Content Blocks can be added seamlessly, making it easier to introduce new features and functionality.

Key Features

- Intuitive user interface
- A centralized Content Library where all Content Blocks are stored, making it easier to update and manage them
- Simplified, low-code/no-code content configuration
- Instance management
- Color and image libraries
- Security controls user access and how different roles interact with Genesis:
 - **Genesis Designer:** Administrators, power users, and all other report designers configure content. See [Genesis Designer](#).
 - **Genesis Navigation:** Users consume the content built in Genesis Designer. See [Genesis Navigation](#).

User Roles

- Report designers create, update, and manage content using dashboards. Report designers are typically OneStream administrators with an understanding of their application and knowledge of reporting. See [Designer Home](#) and [Image Library](#).
- Users view the content created by report designers. See [Genesis Navigation](#).
- Solution administrators install Genesis and manage libraries and instances. See [Setup and Installation](#) and [Settings](#).

Setup and Installation

See the following sections to set up and install the solution:

- [Dependencies](#)
- [Update the List of File Extensions](#)
- [Select the Genesis Development Location](#)
- [Create the OneStream Development Application](#)
- [Install Genesis](#)
- [Configure Content Library](#)

NOTE: There are security requirements to install Genesis and import Content Blocks.
See [Solution Administration](#).

Dependencies

Minimum Platform Version 9.0.0 is required. Maximum Platform Version is 9.3.x.

Update the List of File Extensions

Some environments restrict file usage by requiring an explicit whitelist of approved file extensions. If your organization enforces file extension whitelisting, ensure the following extensions are added to the approved list to support Genesis functionality:

- .json
- .xml
- .zip
- .gzip

File extension whitelisting is configured at the environment level.

See "Define the List of File Extensions" in the *Design and Reference Guide*.

Select the Genesis Development Location

Before installation, decide whether to build the solution directly in the Production OneStream application or in a separate Development OneStream application. This section provides some key considerations for each option.

Production OneStream Application: The primary advantage of building the solution in a Production application is that you will not have to migrate the resulting work from a Development application. However, there are intrinsic risks when making design changes to an application used in a Production capacity, and it is not advised.

NOTE: OneStream strongly recommends that you implement the solution in the Development environment with a fresh copy of the Production application before starting work.

NOTE: Use Cloud Administration Tools to create a Production application.

Development OneStream Application: As a best practice, use the Development OneStream application to build the solution.

Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to Genesis, such as security groups and linked dashboards, are in the Production application.
2. Create a backup copy of your Production database, or copy your Production OneStream application to your Development environment and rename it. This Development version will be used for your Genesis project.

NOTE: Use Cloud Administration Tools to create an application copy.

3. It is suggested to temporarily increase the Database Command Timeout settings for the installation. This can be done in the OneStream Application Server Configuration File. In Database Connections under the Connection Strings section, set the Command Timeout and Command Timeout Large settings to 3600. These values can be reverted after the installation is complete.
4. Go to **Cloud Administration Tools**, and click the **RESET IIS** button.

TIP: Schedule an outage to reset IIS because it will take time to reset.

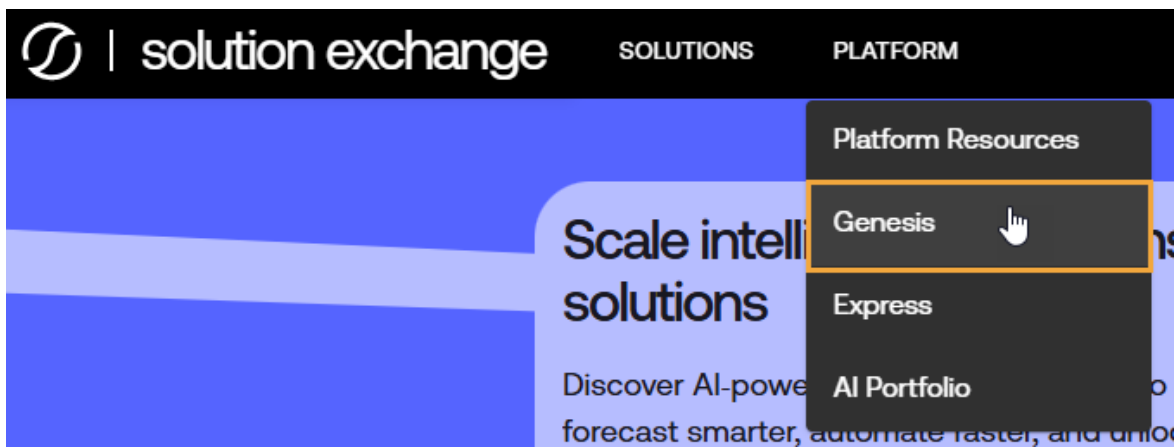
Install Genesis

These are installation instructions to set up Genesis in an application that does not have it installed. To upgrade an existing installation, see [Upgrade an Instance](#).

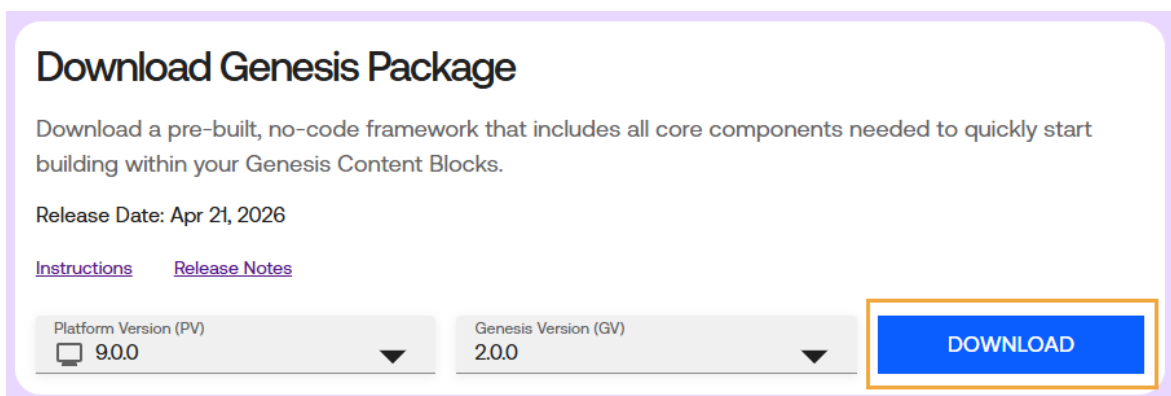
Setup and Installation

IMPORTANT: Loading a Genesis package or Workspace file into an application that already has a Workspace with the same name will result in overrides, which could render the Workspace unusable.

1. Go to **OneStream** [Solution Exchange](#).
2. In the top navigation menu, go to **PLATFORM > Genesis**.



3. On the **Genesis** page, from the **Download Genesis Package** drop-down menus, select the appropriate platform version and the most recent Genesis version.
4. Select the **DOWNLOAD** button to download the Genesis solution.



5. Log in to OneStream.
6. On the **Application** tab, go to **Tools > Load/Extract**.
7. On the **Load** tab, use the **Select File** buttons to locate the solution package.
8. Select **Open**.
9. Select **OK** to complete the installation.

Configure Content Library

These are the sources for the Content Library:

- **Exchange Store:** A centralized registry and distribution service for Content Blocks. It is a cloud marketplace connected to Genesis that enables you to browse an up-to-date library of Content Blocks.

The Exchange Store is available to cloud-hosted environments except FedRAMP environments. It is turned off by default. See [Enable Live Connection to the Exchange Store](#).

- **Genesis Instance Workspace:** A library of Content Blocks stored within the Genesis Workspace that is managed by solution administrators. Content Blocks are manually downloaded from OneStream Solution Exchange and imported into Genesis. This source does not require integration with the centralized library service.

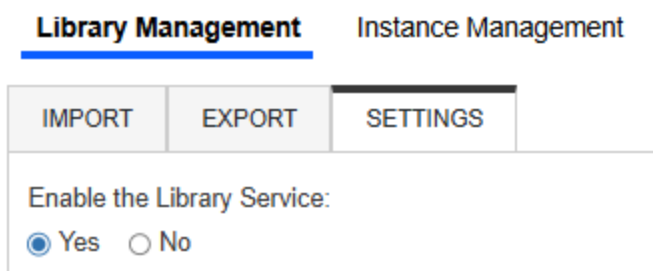
The Genesis Instance Workspace is available to all environments. It is required for on-premises environments and FedRAMP cloud environments. See [Import a Content Block to Local Content Library](#).

Enable Live Connection to the Exchange Store

Follow these instructions to update the live connection to the Exchange Store:

Setup and Installation

1. In **Settings > Library Management**, select the **SETTINGS** tab.
2. Under **Enable the Library Service**, select an option:
 - Select **Yes** to enable integration with the centralized library of Content Blocks in the Exchange Store. You will still have access to the library in the Genesis Instance Workspace.
 - Select **No** to turn off the integration with the Exchange Store. Only the library in the Genesis Instance Workspace will be available.



Library Management Instance Management

IMPORT EXPORT **SETTINGS**

Enable the Library Service:

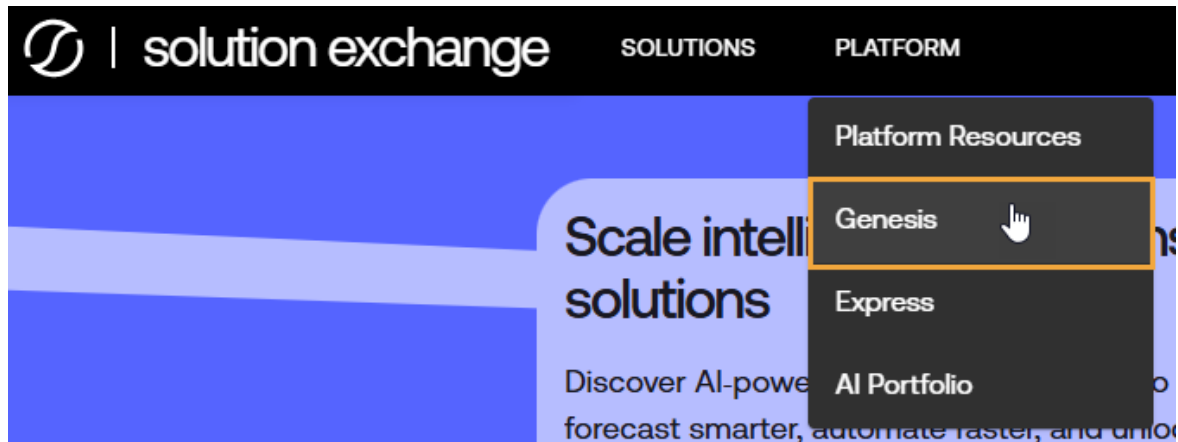
☒ Yes ☐ No

Import a Content Block to Local Content Library

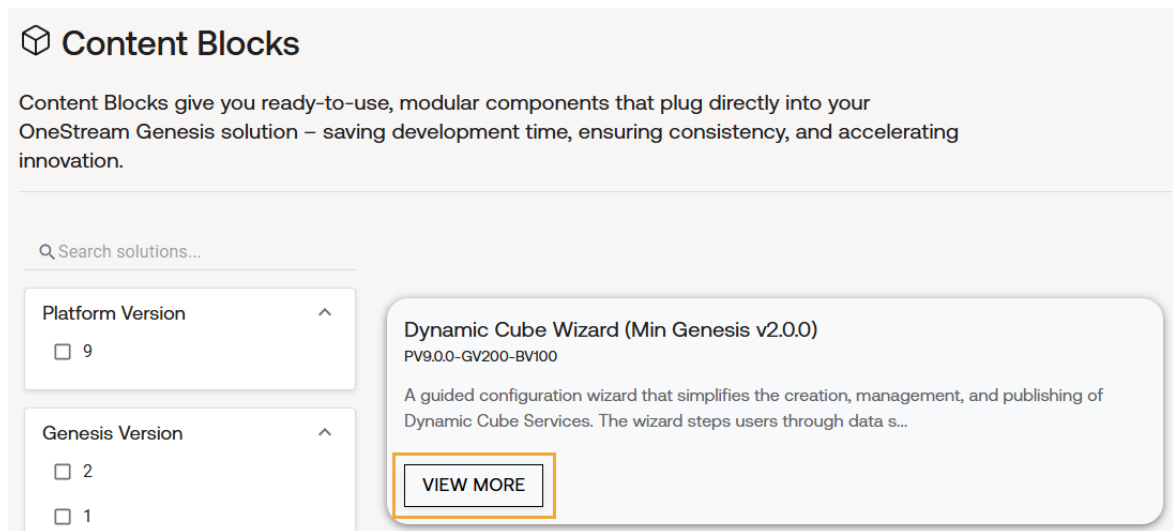
Follow these instructions to download and import Content Blocks from OneStream Solution Exchange:

Setup and Installation

1. Go to OneStream [Solution Exchange](#).
2. In the top navigation menu, go to **PLATFORM** > **Genesis**.



3. On the **Genesis** page, under **Content Blocks**, find the Content Block to download, and select the **VIEW MORE** button.



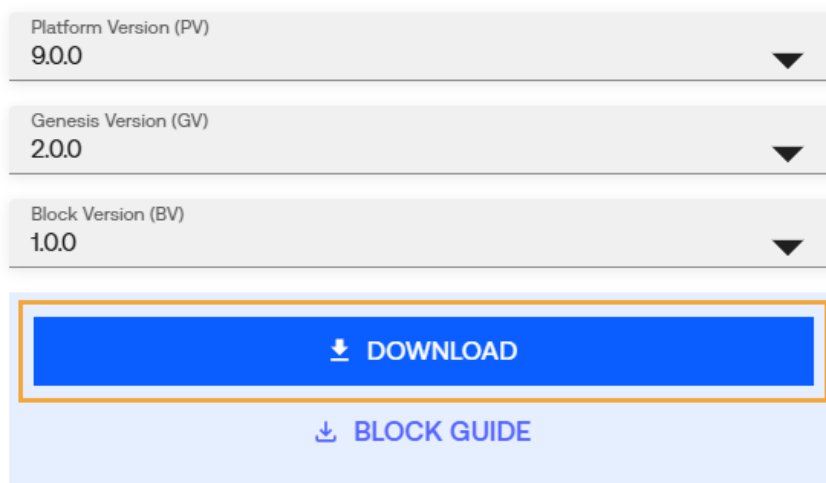
TIP: To find a specific Content Block, use the search field and filters as needed.

Setup and Installation

4. From the drop-down menus, select the appropriate platform, Genesis, and Content Block versions.
5. Select the **DOWNLOAD** button to download the Content Block.

Dynamic Cube Wizard (Min Genesis v2.0.0)

A guided configuration wizard 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 provide additional control for more refined configuration.



The screenshot shows a web interface for the Dynamic Cube Wizard. It features three stacked dropdown menus for selecting versions: Platform Version (PV) set to 9.0.0, Genesis Version (GV) set to 2.0.0, and Block Version (BV) set to 1.0.0. Below these menus is a large blue button with a download icon and the text 'DOWNLOAD', which is highlighted by an orange rectangular border. Underneath the button is a link labeled 'BLOCK GUIDE' with a download icon.

6. Log in to OneStream.
7. Go to **Genesis Designer > Settings > Library Management**.
8. Follow the instructions to import a library. See [Import a Library](#).

Genesis Navigation

The Genesis Navigation page represents the end-user access to Genesis, displaying the results configured in Genesis Designer.

To access the Genesis Navigation page, go to **OnePlace > Dashboards > Genesis Navigation > Genesis Navigation**.

Application Groups

Application Groups are a breakdown of different user flows. Each Genesis instance has the following Application Groups: Home, Admin, Config, and Help. These groups can be customized to any user flow.

Example: Use Home for the standard end-user view, Admin for Workflow Profile setup, Config for a security user flow, and Help for documentation.

Application Groups can also be renamed to represent a different user flow, for example, Planning or Reporting.

Navigation Groups

A Navigation Group represents a group of one or more Pages. Navigation Groups organize content into a process flow.

Pages

Pages display the content in the user interface. Pages have a one-to-one relationship with content. Content can be linked to a Page from existing dashboards or injected using Content Blocks.

NOTE: Because of the one-to-one relationship, you can only link one existing dashboard or inject one Content Block to each Page.

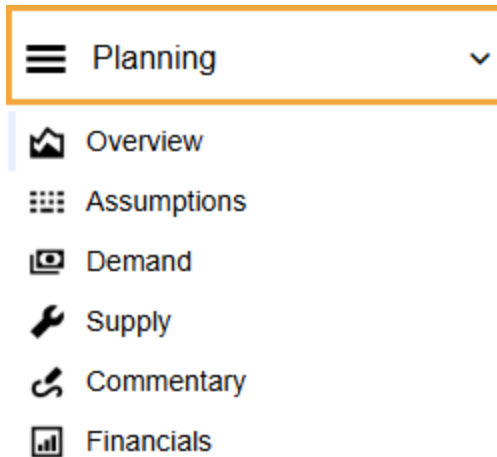
View Content in Genesis Navigation

The default Application Group that displays is Home. Default Navigation Groups and Pages are set in Genesis Designer. See [Reorder List](#).

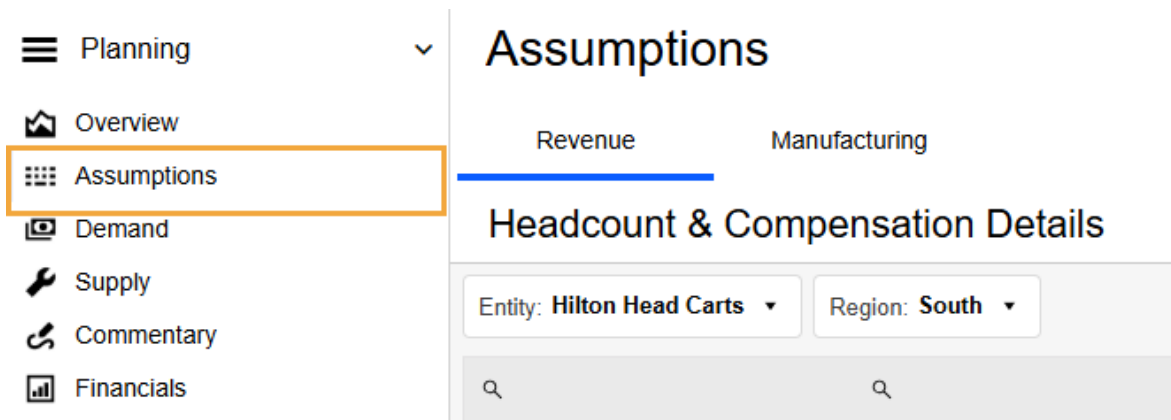
NOTE: There are security requirements for Genesis Navigation. See [Genesis Navigation](#).

Genesis Navigation

1. On the left panel, from the drop-down menu, select an Application Group. The associated Navigation Groups will be listed in the navigation bar below.



2. Select a Navigation Group.



NOTE: If the Navigation Group has multiple Pages, they will display in the page bar as a row at the top of the screen.

3. If multiple Pages are listed, select a Page to view the associated content.

Genesis Navigation

Planning

Overview

Assumptions

Demand

Supply

Commentary

Financials

Home

Assumptions

Revenue

Manufacturing

Headcount & Compensation Details

Entity: Hilton Head Cars Region: South

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Apr 2026	May 2026	Jun 2026	J
Headcount Forecast:													
Product revenue													
Direct	642,550	594,772	672,013	688,128	740,981	824,765	1,113,576	1,201,838	1,194,407	1,343,863	1,056,712	1,087,032	
Bushwood Cars	8,406,329	8,930,378	9,013,135	9,246,607	9,406,689	9,866,100	9,911,422	10,118,3...	10,319,6...	10,435,0...	10,068,8...	11,545,1...	1
Avg Sales per Employee													
Direct	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	
Bushwood Cars	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	222,652	
Headcount													
Direct	3	3	3	3	3	4	5	5	5	6	5	5	
Bushwood Cars	38	40	40	42	42	44	45	45	46	47	45	52	
Compensation Forecast:													
Base Salary Rate													
Direct	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	
Bushwood Cars	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	5,645	
Other Benefits Rate													
Direct	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	
Bushwood Cars	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	
Base Salary													
Direct	16,935	16,935	16,935	16,935	16,935	22,580	28,225	28,225	28,225	33,870	28,225	28,225	
Bushwood Cars	214,510	225,800	225,800	237,090	237,090	248,380	254,025	254,025	259,670	265,315	254,025	293,540	
Other benefits													
Direct	1,694	1,694	1,694	1,694	1,694	2,258	2,823	2,823	2,823	3,387	2,823	2,823	
Bushwood Cars	21,451	22,580	22,580	23,709	23,709	24,838	25,403	25,403	25,967	26,532	25,403	29,354	
Total South Region:													
Total Headcount	41	43	43	45	45	48	50	50	51	53	50	57	
Total Base Salary	231,445	242,735	242,735	254,025	254,025	270,960	282,250	282,250	287,895	299,185	282,250	321,765	
Total Benefits	23,145	24,274	24,274	25,403	25,403	27,096	28,225	28,225	28,790	29,919	28,225	32,177	

TIP: In the left pane, click the **Close Navigation Bar** button to expand the content view to a full screen. Click the **Open Navigation Bar** arrow to view the left pane.

Genesis Designer

On the Genesis Designer page, administrators, power users, and report designers organize content and manage libraries, instances, and images. They can also navigate to the end-user view.

To access the Genesis Designer page, go to **OnePlace > Dashboards > Genesis Designer > Genesis Designer**.

Use the toolbar to navigate to the pages in Genesis Designer.



- To organize content into categories by Application Group, Navigation Group, and Page, click the **Designer Home**  icon. This page is typically used by application administrators, power users, and report designers. See [Designer Home](#).
- To manage the Genesis library (images, color sets, and Content Blocks) and instances, click the **Settings**  icon. This page is typically used by solution administrators. See [Settings](#).
- To manage images, click the **Image Library**  icon. This page is typically used by report designers. See [Image Library](#).
- To go to the end-user view, click the **Navigation View**  icon. See [Genesis Navigation](#).

NOTE: There are security requirements for Genesis Designer. See [Genesis Designer](#) and [Solution Administration](#).

Designer Home

On the Designer Home page, report designers and power users develop user flows by organizing content into categories by Application Group, Navigation Group, and Page. This structured approach ensures an intuitive user experience. Customize the Genesis instance by applying colors and styles to enhance the display and usability.

Use the toolbar to navigate to pages in the Designer Home.

Genesis



- To manage Application Groups, Navigation Groups, and Pages and assign and create content, click the **Navigation**  icon. See [Navigation](#).
- To manage Content Blocks, click the **Content Management**  icon. See [Content Management](#).
- To apply a color theme to the Genesis instance, click the **Colors**  icon. See [Colors](#).
- To customize the display of the navigation bar and page bar in the Genesis instance, click the **Styles**  icon. See [Styles](#).

NOTE: There are security requirements for Genesis Designer, the Navigation page, and the Content Management page. See [Genesis Designer](#), [Navigation](#), and [Content Management](#).

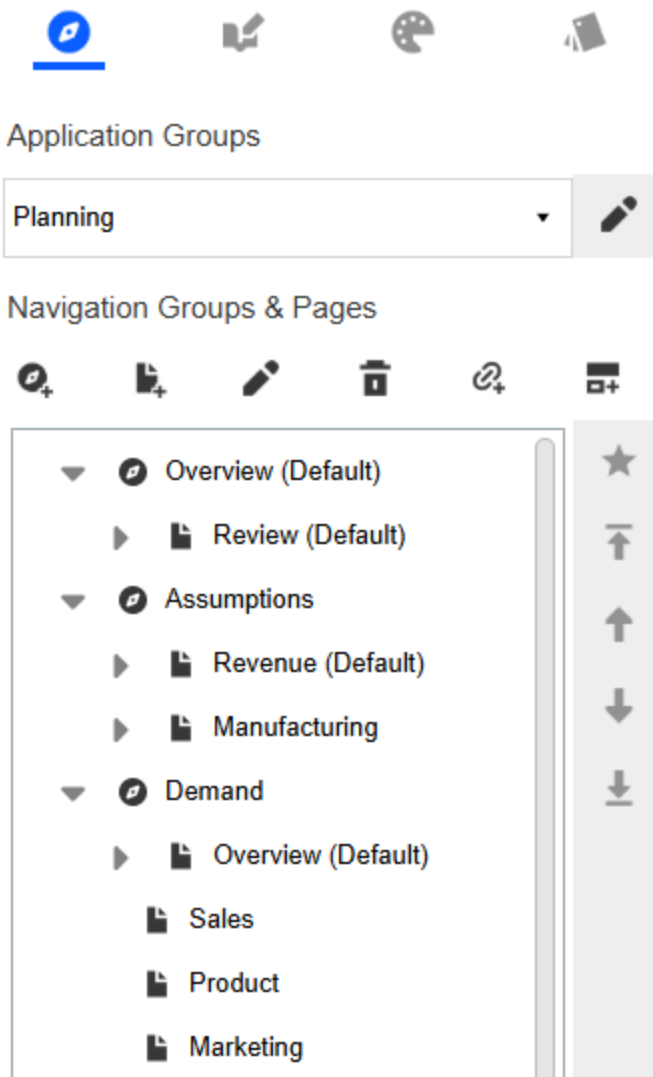
Navigation

The Navigation page displays a hierarchical view of how content is organized into Application Groups, Navigation Groups, and Pages. From this page, you can configure Application Groups, Navigation Groups, and Pages to define the end-user view.

The page includes the following sections:

- On the left panel, you can manage Application Groups, Navigation Groups, and Pages, add and configure content, and reorder the navigation tree and set defaults.

Genesis



See [Application Groups](#) and [Navigation Groups, Pages, and Content](#).

- Select an item in the navigation tree. Then, to the right, you can select the Preview, Designer, and Content tabs to view and configure content.

In the upper right, you can set your preference to turn the preview on (click the **Show Preview**  icon) or off (click the **Hide Preview**  icon).

- **Preview:** This tab displays a full preview of the end-user view of the selected content.

Preview

Designer

Content

Planning

Overview

Assumptions

Demand

Supply

Commentary

Financials

Home

Overview

Forecast Summary Motors Division

Region: Global

	Actual Prior Yr	Curr Yr Variance	Forecast Curr Yr	Next Yr Variance	Forecast Next Yr
Cart Revenue	247,104,862	22,447,641	269,552,504	114,575,164	384,127,667
Accessory Revenue	4,541,646	80,108	4,621,753	579,886	5,201,639
Discounts	-12,582,325	-78,279	-12,660,604	-7,748,654	-20,409,258
Net revenue	239,064,183	22,449,470	261,513,653	107,406,396	368,920,049
Labor COGS	33,736,148	2,281,507	36,017,655	13,516,107	49,533,762
Material COGS	130,114,201	11,128,561	141,242,762	59,521,699	200,764,461
Overhead COGS	7,089,012	479,232	7,568,244	2,901,615	10,469,858
Cost of goods sold	170,939,360	13,889,301	184,828,661	75,939,420	260,768,081
Gross margin	68,124,822	8,560,170	76,684,992	31,466,976	108,151,968
Employee salary	4,805,244	1,316,081	6,121,324	3,493,045	9,614,369
Employee benefits & other	489,074	127,348	616,422	345,015	961,437
Compensation	5,294,318	1,443,429	6,737,746	3,838,060	10,575,806
Research & development	776,786	128,358	905,143	394,857	1,300,000
Marketing & advertising	3,557,245	525,098	4,082,343	257,087	4,339,430
Other operating expenses	4,896,553	712,470	5,609,023	305,857	5,914,880
Total operating expenses	14,524,901	2,809,354	17,334,255	4,795,861	22,130,116
Depreciation and amortization	7,242,212	1,306,299	8,548,511	1,937,761	10,486,272
Total operating income	53,602,333	4,750,816	59,350,737	26,671,115	85,991,852

Product:

Refresh



- **Designer:** If you select a Content Block or a Page that has a Content Block injected, this tab displays the configuration options. Options are different for each Content Block.

Preview

Designer

Content

i

o

Cube View With Layouts Configuration

Cube View

Filters

Buttons

Layouts

Cube View Settings

Select Cube View

_cv_ForecastOverviewMain_mtr

Description

Forecast Summary Motors Division

↺

Default Header

Hidden

▼

Save

NOTE: If you select a Navigation Group, dashboard, or Page that has a dashboard linked, the Designer tab has no content.

NOTE: For configuration instructions, see the *Content Block Guide* in the Content Library on the Details page or on OneStream [Solution Exchange](#).

To view details for the Content Block, click the **Show block Info**  icon.

Content Block Detail

**Name**

Cube View With Layouts

Description

The Cube View with Layouts Content Block displays a Cube View and renders embedded filters for the parameters detected in the Cube View. It provides the ability to run calculations, save data, and perform all the usual actions associated with a cube view. Additionally, users can choose from a variety of layouts, each containing up to three cards. These cards can be configured with other content blocks or existing dashboards, creating a vibrant and interactive experience.

Category

Data (Cubes)

Modality

Universal

Created By

OneStream

Version

110

Minimum Genesis Version

100

Minimum Platform Version

9.0.0

- **Content:** This tab displays a rendered preview of the output of the selected content.

Preview Designer **Content**

Forecast Summary Motors Division

Region: Global

	Actual Prior Yr	Curr Yr Variance	Forecast Curr Yr	Next Yr Variance	Forecast Next Yr
Cart Revenue	247,104,862	22,447,641	269,552,504	114,575,164	384,127,667
Accessory Revenue	4,541,646	80,108	4,621,753	579,886	5,201,639
Discounts	-12,582,325	-78,279	-12,660,604	-7,748,654	-20,409,258
Net revenue	239,064,183	22,449,470	261,513,653	107,406,396	368,920,049
Labor COGS	33,736,148	2,281,507	36,017,655	13,516,107	49,533,762
Material COGS	130,114,201	11,128,561	141,242,762	59,521,699	200,764,461
Overhead COGS	7,089,012	479,232	7,568,244	2,901,615	10,469,858
Cost of goods sold	170,939,360	13,889,301	184,828,661	75,939,420	260,768,081
Gross margin	68,124,822	8,560,170	76,684,992	31,466,976	108,151,968
Employee salary	4,805,244	1,316,081	6,121,324	3,493,045	9,614,369
Employee benefits & other	489,074	127,348	616,422	345,015	961,437
Compensation	5,294,318	1,443,429	6,737,746	3,838,060	10,575,806
Research & development	776,786	128,358	905,143	394,857	1,300,000
Marketing & advertising	3,557,245	525,098	4,082,343	257,087	4,339,430
Other operating expenses	4,896,553	712,470	5,609,023	305,857	5,914,880
Total operating expenses	14,524,901	2,809,354	17,334,255	4,795,861	22,130,116
Depreciation and amortization	7,242,212	1,306,299	8,548,511	1,937,761	10,486,272
Total operating income	46,357,709	4,444,517	50,802,226	24,733,354	75,535,579

Product: Refresh

Application Groups

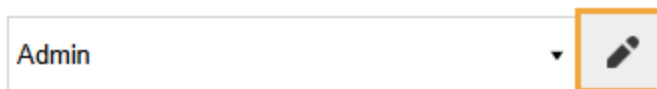
In the Application Groups drop-down menu, select the Application Group to view the associated Navigation Groups and Pages. The Application Groups are Home, Admin, Config, and Help.

Rename an Application Group

You can rename Application Groups to align with the purpose of the user flow (for example, Planning or Reporting).

1. In the **Application Groups** drop-down menu, select the group.
2. Click the **Edit the Selected Item** icon to the right of the drop-down menu.

Application Groups



3. In the **Property Editor** slide-out panel, update the display settings.

Display Settings

- **Description:** Enter a new description, which will display as the name.
- **ToolTip Text:** Add text to display as a tooltip when a user hovers over the Application Group name.

Property Editor



Edit Application Group Attributes

Navigation Path

Application Group: Admin

Display Settings

Description:

Reporting

ToolTip Text:

Standard Reports

Security Settings

Access Group:

Everyone ▼

Visibility Settings

Hide:

No ▼

Save

Cancel

4. Click the **Save** button.

Update Application Group Security and Visibility Settings

You can update security and visibility settings for Admin, Config, and Help Application Groups. All users automatically have access to the Home Application Group; this setting cannot be changed.

1. In the **Application Groups** drop-down menu, select the group.
2. Click the **Edit the Selected Item** icon to the right of the drop-down menu.

Application Groups



3. In the **Property Editor** slide-out panel, update the security and visibility settings.

Security Settings

- **Access Group:** Select the security group that will have access to view this item. These security groups are in **System > Security > Groups**.

Visibility Settings

- **Hide:** To hide the content from all users, select **Yes**. This option is useful if you are preparing content that is not ready for display. When the content is ready for users to view, you can select **No**, then it will be visible to the selected Access Group.

Property Editor



Edit Application Group Attributes

Navigation Path

Application Group: Admin

Display Settings

Description:

Reporting

ToolTip Text:

Standard Reports

Security Settings

Access Group:

Everyone ▼

Visibility Settings

Hide:

No ▼

Save

Cancel

4. Click the **Save** button.

TIP: Click the **Preview** tab to see the end-user view with the updated settings.

Navigation Groups, Pages, and Content

A Navigation Group represents a grouping of one or more Pages. Use Navigation Groups to organize content into a process flow, for example, Revenue or Expense.

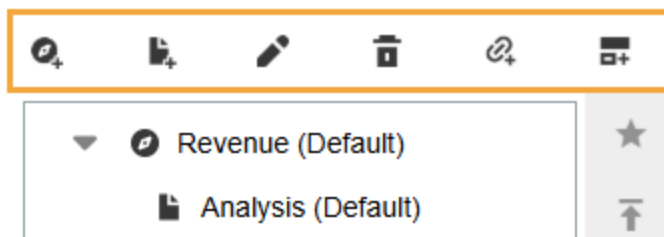
Pages display content and have a one-to-one relationship with that content. Content can be linked to a Page from existing dashboards or injected using Content Blocks.

NOTE: Because of the one-to-one relationship, you can only link one existing dashboard or inject one Content Block to each Page.

Use the toolbars and navigation tree to manage Navigation Groups and Pages. The navigation tree displays Navigation Groups as the top-level items, associated Pages as second-level child items, associated content items as third-level child items, and associated content within content items as fourth-level child items.

Use the toolbar on the navigation pane to create, edit, delete, link, and inject items.

Navigation Groups & Pages



See the following sections:

- [Create a Navigation Group](#)
- [Create a Page](#)
- [Edit a Navigation Group or Page](#)
- [Edit a Content Block Description](#)
- [Delete a Navigation Group, Page, or Content Item](#)
- [Link Existing Content from a Dashboard](#)

- [Inject a New Content Block](#)
- [Reorder List](#)

Create a Navigation Group

1. Click the **New Navigation Group** icon.



2. In the **Property Editor** slide-out panel, enter the following information.

- **Navigation Group:** Enter a new name, which will be used as an internal identifier for the Navigation Group.

NOTE: The name must be unique. It cannot be used for another Navigation Group in the same Application Group. The name must use alphanumeric characters (A–Z, a–z, and 0–9) and cannot include OneStream reserved words. See [Reserved Words](#). Also, characters that are not valid and spaces are automatically removed.

TIP: If a Navigation Group has a long name, you can increase the navigation bar width to make space for it in the end-user view. See [Navigation Bar](#).

- **Description:** Add a description, which will display as the name in the navigation bar.

Property Editor



Application Group Admin

Navigation Group Revenue

Description Revenue

Save

Cancel

3. Click the **Save** button.

Create a Page

1. In the navigation tree, select a Navigation Group for the new Page.
2. Click the **New Page** icon.



3. In the **Property Editor** slide-out panel, enter the following information.

- **Page:** Enter a new name, which will be used as an internal identifier for the Page.

NOTE: The name must be unique. It cannot be used for another Page in the same Navigation Group. The name must use alphanumeric characters (A–Z, a–z, and 0–9) and cannot include OneStream reserved words. See [Reserved Words](#). Also, characters that are not valid and spaces are automatically removed.

TIP: If a Page has a long name, you can increase the button width to make space for it in the end-user view. See [Page Bar](#).

- **Description:** Add a description, which will display as the name in the page bar.

Property Editor



Application Group Admin

Navigation Group Revenue

Page

Description

Save

Cancel

4. Click the **Save** button.

Edit a Navigation Group or Page

1. In the navigation tree, select the Navigation Group or Page.
2. Click the **Edit** icon.



3. In the **Property Editor** slide-out panel, update the following settings.

Display Settings

- **Display Type:** Select the display of the Navigation Group name in the navigation bar or the Page name in the page bar.
 - **TextOnly:** Displays the item as text only.
 - **ImageOnly:** Displays the item as an image only.
 - **ImageAndTextLeftAuto:** Displays both an image and text, and the horizontal space for each is automatically sized.
 - **ImageAndTextLeft####:** Displays both an image and text, and the horizontal space for each is represented by the numbers in percent. The first two numbers are for the image, and the second two numbers are for the text.

Example: ImageAndTextLeft3070 displays an image in 30% of the space and text in 70% of the space.

- **Display Divider Line Above Button** (Navigation Group only): Select **Yes** to add a divider line above the Navigation Group name, or select **No** to hide it.
- **Description:** Update the description, which will display as the item name.

- **ToolTip Text:** Add text to display as a tooltip when a user hovers over the item name.
- **Font Size:** Select the font size for the item name.

TIP: If you use a larger font size, you can increase the navigation bar width and button height or the page bar button width to make space for it in the end-user view. See [Navigation Bar](#) and [Page Bar](#).

- **Image Name:** If you selected a Display Type option that includes an image, select the image to display.

TIP: By default, each image has a black version and a white version. In this list, the images are grouped by name not color. To view the images, go to the Image Library. See [Image Library](#). To set the image color, go to the Colors page. See [Colors](#).

Security Settings: These settings define user access and the view for users who do not have access.

- **Access Group:** Select the security group that will have access to view this item. These security groups are in **System > Security > Groups**. Default Navigation Groups and Pages must be set to **Everyone**.
- **No Access Type:** Select the view for users without access.
 - **ShowBanner:** Users without access will see the item listed in the navigation bar or page bar. But, when they select it, they will see the dashboard defined in the No Access Banner setting instead of the Content Block or linked dashboard.
 - **Hide:** Users without access will not see the item listed in the navigation bar or page bar.

- **No Access Banner:** If you selected ShowBanner as the No Access Type, enter a dashboard name to display. The default is banner_NoAccess_(App)_(Main), which displays the text: NO ACCESS.

Visibility Settings

- **Hide:** To hide the item in the navigation bar or page bar for all users, select **Yes**. This option is useful if you are preparing content that is not ready for display. When the content is ready for users to view, you can select **No**, then it will be visible to the selected Access Group.

Title Bar Settings (Navigation Group only)

- **Hide:** Select **Yes** to hide the Navigation Group name as a title bar above the Page, or select **No** to display it.
- **Font Size:** Select the font size for the Navigation Group name in the title bar.

Edit Button Actions  : Click this icon to configure actions performed when the Navigation Group or Page is selected.

IMPORTANT: These actions only perform when a user selects a Navigation Group or Page. Default Navigation Groups and Pages open automatically without a user selecting them. Therefore, it is recommended to only apply actions to Navigation Groups and Pages that are not set as default. To update the default setting of a Navigation Group or Page, see [Reorder List](#).

In the **Action Manager** slide-out panel, update the options and then click the **Close** button.

TIP: For the Set Workflow POV and Set Cube POV sections, use Genesis syntax (~|Parameter|~ and ~SubstitutionVariable~) to designate dynamic values and ensure they resolve correctly at runtime.

- **Set Workflow POV:** Select this checkbox to set the Workflow POV. Enter the Workflow POV settings in the **Workflow Profile**, **Workflow Scenario**, and **Workflow Time** fields. Enter parameters as ~|Parameter|~ and substitution variables as ~SubstitutionVariable~.
- **Set Cube POV:** Select this checkbox to set the Cube POV. Enter parameters as ~|Parameter|~ and substitution variables as ~SubstitutionVariable~. Click the **Build POV from Member Filter** ellipsis icon to open the **Member Filter Builder** slide-out panel. Add a Member Filter and then click the **OK** button.

See "Member Filter Builder" in the *Design and Reference Guide*.

- **Navigation:** Use this option to navigate users to the designated location in OneStream. Select the location that users will view in the **Page Type** and **Page Item** drop-down menus.

IMPORTANT: If an action is assigned to a Navigation Group or Page, it takes precedence over assigned content, such as a Content Block or linked dashboard.

IMPORTANT: Some page types, such as Application Properties, are not available in the Modern Browser Experience. Users can only view these page types in the Windows application.

Action Manager



Use Genesis syntax to designate dynamic values and ensure they resolve correctly at runtime. Enter parameters as ~|Parameter|~ and substitution variables as ~SubstitutionVariable~.

☐ Set Workflow POV

Workflow Profile

Workflow Scenario

Workflow Time

☐ Set Cube POV



Navigation

Page Type

Page Item

Close

- Click the **Save** button.

Property Editor ✕

Navigation Path
Application Group Admin
Navigation Group Revenue

Display Settings
Display Type ImageAndTextLeftAuto
Display Divider Line Above Button No
Description Revenue
ToolTip Text Revenue
Font Size 14
Image Name AreaChart | Library, General

Security Settings
Access Group Everyone
No Access Type ShowBanner
No Access Banner banner_NoAccess_(App)_(Main)

Visibility Settings
Hide No

Title Bar Settings
Hide Yes
Font Size 28

 Save Cancel

TIP: Click the **Preview** tab to see the end-user view with the updated settings.

Edit a Content Block Description

A Content Block description is the name of the Content Block that displays in the navigation trees on the Content Management and Navigation pages. Descriptions are optional. If no description is entered, the Maintenance Unit name displays instead.

To edit a Content Block description, follow these steps:

1. In the navigation tree, select the Content Block.
2. Click the **Edit** icon.



3. In the **Block Settings** slide-out panel, in the **Description** field, add or edit the description.
4. Click the **Save** button.

NOTE: Content Blocks are configured on the Designer tab. For instructions, see the *Content Block Guide* in the Content Library on the Details page.

Delete a Navigation Group, Page, or Content Item

If a parent item has an associated child item, it cannot be deleted. Remove all associated child items, then delete the parent item.

Default Navigation Groups and Pages cannot be deleted. Set another item as default, then delete the Navigation Group or Page. See [Reorder List](#).

To delete a Navigation Group, Page, or content item, follow these steps:

1. In the navigation tree, select the Navigation Group, Page, or content item.
2. Click the **Delete** icon.



3. For a Content Block, confirm the deletion method:

- To remove it from the current location only, click the **Detach from this location** button. The Content Block remains in the instance and can continue to be used.
- To permanently delete it from the instance, click the **Delete permanently** button.

NOTE: If the Content Block has other parent items in the current instance, it will automatically detach it from the current location and notify you of the change.

Link Existing Content from a Dashboard

1. In the navigation tree, select the Page.
2. Click the **Link an Existing Content Item from a Shared Workspace** icon.



3. In the **Shared Workspace Browser** slide-out panel, select the dashboard from the **Available Dashboards** list.

Shared Workspace Browser

Shared Workspace Link

Shared Workspaces

Default

Filter (Contains)

✓

✕

Dashboard Type

☒ All ☐ Top Level Only

Available Dashboards

0_1_Header_Title_FXM

0_1b_Header_Border_FXM

0_2_Header_Help_FXM

0_3_Frame_Central_FXM

0_4_Sidebar_Menu_FXM

0_5_Frame_Content_FXM

0_AADashboard_ACTEXT

0_AAReport_ACTEXT

0_ActivityAnalysisChart_OSDC - Task Concurrency

0_ActivityAnalysisMainChart_OSDC

0_5_Sidebar_Menu_FXM

Save

Cancel

TIP: Use the **Shared Workspaces** drop-down menu, **Filter (Contains)** field, and **Dashboard Type** radio buttons to filter the results.

- Click the **Save** button.

IMPORTANT: If the linked dashboard cannot display in the Preview tab, you will receive an error message and be unable to move forward. Click the **Hide Preview**  icon to turn off the preview. Then, in the navigation tree, select the content item (the linked dashboard), and click the **Delete** icon to remove it.

Inject a New Content Block

To inject a Content Block in a Page, follow these steps:

1. In the navigation tree, select the Page.
2. Click the **Inject a New Basic Library Content Item** icon.



3. In the **Content Library** slide-out panel, click the **Add this Content Package**  icon next to the Content Block to add it.

Content Library

X

Filter (Contains):

✓

X

Library Source

Category

Modality

Availability

Exchange Store

All

All

All

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Announcement

By OneStream v1.0.0

Details

The Announcement Content Block is a text box that allows designers to display important announcements for various users. You can use Parameters for things such as Users or User Groups, Time, Scenario, etc. This block is ideal for landing pages or home screens or can be embedded into a Dashboard alongside additional content.

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BI Viewer

By OneStream v1.0.0

Details

The BI Viewer Content Block uses pre-existing Data Adapters and the BI Viewer Designer to allow users to create their own visualizations. Specific Data Adapter(s) are assigned to the block and can query data both internally and externally. Parameter settings are automatically generated if the Data Adapter contains Parameters. You can also add or remove Parameters as needed. Once configured, users will have a data-controlled designer to create vibrant visualizations.

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BI Viewer Embedded

By OneStream v1.0.0

Details

The BI Viewer Embedded Content Block uses pre-existing Data Adapters and the BI Viewer Designer to allow users to create their own visualizations. This block is almost identical to the BI Viewer Content Block but was designed to be embedded and display along-side other Components on a Dashboard. This makes it ideal for drill-down analysis. The borders were removed, and the Dashboard Type is Embedded to allow easy integration and the ability to pass Parameters.

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Book Viewer

By OneStream v1.0.0

Details

The Book Viewer content block enables users to view and navigate through PDF Report Books directly within the page. Designers configure which Report Book to display to the user giving them easy access to important documents and/or reports.

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Buttons

By OneStream v1.0.0

Details

The Buttons Content Block lets you configure multiple buttons for triggering POV and Navigation Actions. The buttons display in a grid-like layout on the page for an organized and clean appearance. Button actions are executed by user-click.

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Cube View Advanced

By OneStream v1.0.0

Details

The Cube View Advanced content block is used to display a Cube View on a page. Cube Views can be configured to display filters as Combo Boxes or Member Selectors for dynamic member selection. The filters are dynamically generated based on parameters in the Cube View. Additionally, buttons can be configured to Save upon data entry and/or run calculations and Data Management Sequences.

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Cancel

Items that are not available with the current license have a lock  icon. Contact your representative for pricing information.

TIP: Use the **Filter (Contains)** field and the **Library Source**, **Category**, **Modality**, and **Availability** drop-down menus to filter for a Content Block.

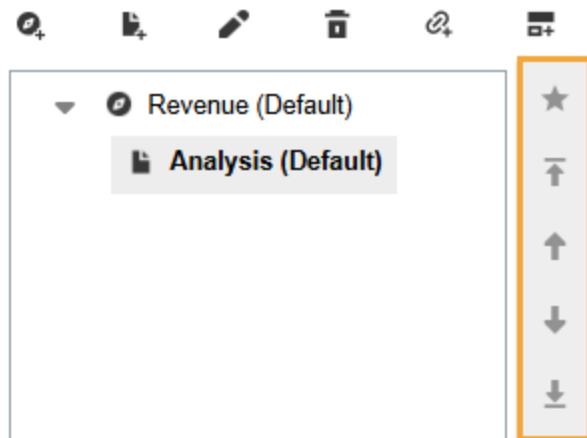
TIP: Click **Details** for more information about the Content Block.

NOTE: Content Blocks are configured on the Designer tab. For instructions, see the *Content Block Guide* in the Content Library on the Details page.

Reorder List

Use the toolbar to the right of the navigation pane to reorder the list of items.

Navigation Groups & Pages



- To define the default view for users in Genesis Navigation, select an item and then click the **Set As Default** ★ icon. Then, the Navigation Group or Page displays by default when the parent item is selected.
- To move an item to display first in the navigation tree, select it and then click the **Move To First** ↑ icon.
- To move an item up in the navigation tree, select it and then click the **Move Up** ↑ icon.
- To move an item down in the navigation tree, select it and then click the **Move Down** ↓ icon.
- To move an item to display last in the navigation tree, select it and then click the **Move To Last** ↓ icon.

Content Management

On the Content Management page, you can manage Content Blocks in the current Genesis instance:

- View, upgrade, configure, and delete Content Blocks.
- Edit Content Block descriptions.
- Inject a Content Block without immediately assigning it to a Page or Content Block.

The Content Management page includes the following sections:

- **Content Management:** This panel displays a toolbar to delete, inject, and upgrade Content Blocks as well as edit descriptions.

Content Management

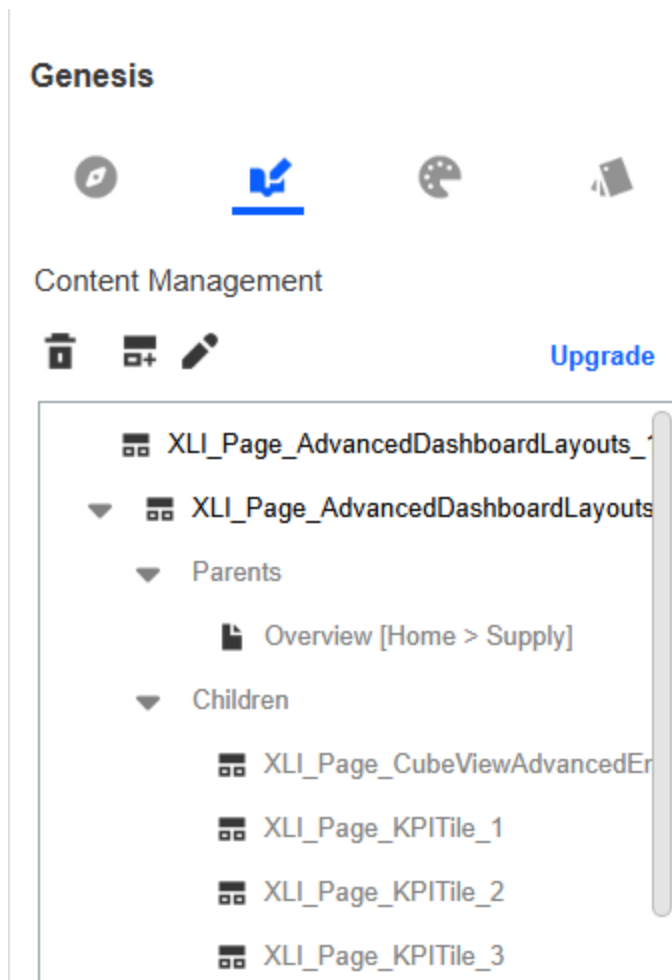


Upgrade

The navigation tree displays injected Content Blocks as top-level items with all relationships to Pages and Content Blocks as nested items.

- **Parents:** Pages or Content Blocks in the current instance that directly reference this Content Block
- **Children:** Content Blocks or linked dashboards nested within this Content Block

Expand a Content Block and then expand the Parents and Children to view the relationships.



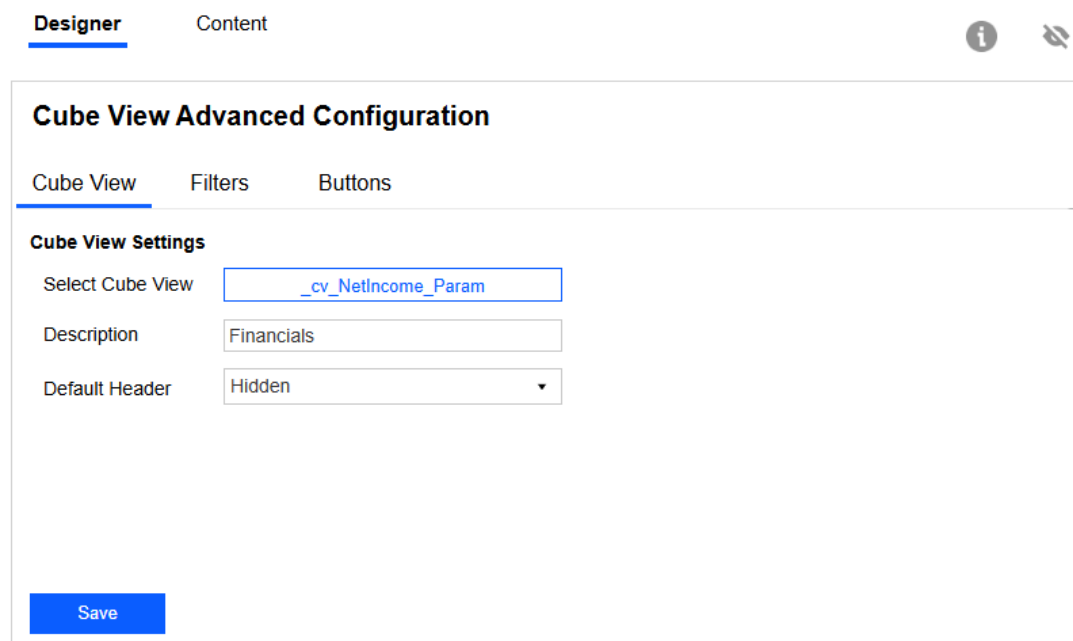
See the following sections:

- [Delete a Content Block](#)
- [Inject a Content Block](#)
- [Edit a Content Block Description](#)
- [Upgrade Content Blocks](#)

- Select a Content Block. Then, to the right, you can select the Designer and Content tabs to view and configure the content.

In the upper right, you can set your preference to turn the preview on (click the **Show Preview**  icon) or off (click the **Hide Preview**  icon).

- **Designer:** This tab displays the configuration options for a selected Content Block. Options are different for each Content Block.



The screenshot shows the 'Designer' tab selected in the top navigation bar, with 'Content' as an alternative. In the top right corner, there are icons for help (i) and hide preview (eye with slash). The main content area is titled 'Cube View Advanced Configuration' and has three sub-tabs: 'Cube View' (selected), 'Filters', and 'Buttons'. Under 'Cube View Settings', there are three fields: 'Select Cube View' with a text input containing '_cv_NetIncome_Param', 'Description' with a text input containing 'Financials', and 'Default Header' with a dropdown menu set to 'Hidden'. A blue 'Save' button is located at the bottom left of the configuration area.

NOTE: For configuration instructions, see the *Content Block Guide* in the Content Library on the Details page or on OneStream [Solution Exchange](#).

To view details for the Content Block, click the **Show block Info**  icon.

Content Block Detail ✕

Name
Cube View Advanced

Description
The Cube View Advanced content block is used to display a Cube View on a page. Cube Views can be configured to display filters as Combo Boxes or Member Selectors for dynamic member selection. The filters are dynamically generated based on parameters in the Cube View. Additionally, buttons can be configured to Save upon data entry and/or run calculations and Data Management Sequences.

Category
Data (Cubes)

Modality
Universal

Created By
OneStream

Version
110

Minimum Genesis Version
100

Minimum Platform Version
9.0.0

- **Content:** This tab displays a rendered preview of the output of the selected Content Block.

Designer

Content

Select Entity: Rocky Mtn Clubs

Selected Cell: - EUS01

Comments Edit

	BudgetFinal		Forecast6p6		Rolling Forec...	vs Budg...	vs Budget %
Wholesale	270,597,019	1,331,203	271,928,221	387,405	272,315,627	1,718,608	0.6%
eCommerce	136,876,400	-1,019,996	135,856,404	26,748	135,883,152	-993,248	-0.7%
Direct	88,882,400	434,331	89,316,731	162,919	89,479,651	597,251	0.7%
Component	56,957,400	140,771	57,098,171	46,272	57,144,442	187,042	0.3%
Discounts	-11,300,700	37,624	-11,263,076	-24,516	-11,287,592	13,108	-0.1%
Returns	-20,780,200	-25,444	-20,805,644	-32,556	-20,838,200	-58,000	0.3%
Intercompany sales	9,940,400	149,745	10,090,145	18,802	10,108,948	168,548	1.7%
Revenues	531,172,7...	1,048,233	532,220,9...	585,075	532,806,027	1,633,308	0.3%
Cost of goods sold	190,924,370	8,022,942	182,901,428	386,393	182,515,036	8,409,334	4.4%
Gross income	340,248,3...	9,071,175	349,319,5...	971,468	350,290,991	10,042,6...	3.0%
Employee salary	125,219,800	419,423	124,800,377	-12,156,2...	136,956,630	-11,736,8...	-9.4%
Employee benefits & other	24,108,990	-19,310	24,128,300	-57,435	24,185,734	-76,744	-0.3%
Payroll taxes	20,250,300	1,900,795	18,349,505	225,127	18,124,378	2,125,922	10.5%
Compensation	169,579,0...	2,300,908	167,278,1...	-11,988,...	179,266,742	-9,687,6...	-5.7%
Research & development	5,404,500	-197,605	5,602,105	20,813	5,581,292	-176,792	-3.3%
Marketing & advertising	39,542,800	-2,370,537	41,913,337	-14,318	41,927,655	-2,384,855	-6.0%
Other operating expenses	45,588,065	-815,917	46,403,982	289,741	46,114,241	-526,176	-1.2%
Total operating expenses	260,114,4...	-1,083,1...	261,197,6...	-11,692,...	272,889,929	-12,775,...	-4.9%
Depreciation and amortization	28,525,600	-245,276	28,770,876	-26,769	28,797,645	-272,045	-1.0%
Total operating income	51,608,294	7,742,748	59,351,042	-10,747,...	48,603,417	-3,004,8...	-5.8%

Undo/Clipboard

A Font

Club Parts

Acme Nexus Series

GolfStream Epic

Mach Speed

0

200M

400M

Delete a Content Block

You can delete a Content Block when it is no longer needed to keep the list of Content Blocks updated and manageable.

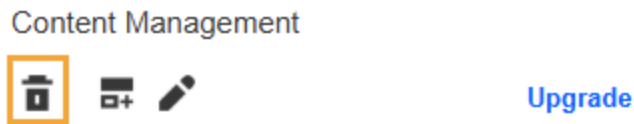
CAUTION: Deleting a Content Block is permanent. It cannot be undone.

If a Content Block has parent items in the current Genesis instance, you must detach the Content Block from each parent item, then delete it.

IMPORTANT: If the parent item is a Content Block that requires a minimum version earlier than Genesis Version 2.0.0, the child Content Block can be deleted without detaching it from each parent item.

To delete a Content Block, follow these steps:

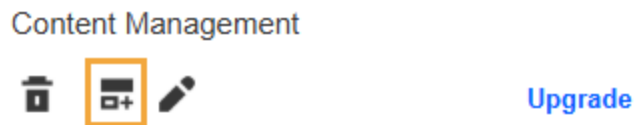
1. In the navigation tree, select the Content Block.
2. Click the **Delete the Selected Item** icon.



Inject a Content Block

To inject a Content Block without adding it to a Page, follow these steps:

1. Click the **Inject Content Block** icon.



2. In the **Content Library** slide-out panel, click the **Add this Content Package**  icon next to the Content Block to add it.

Content Library

Filter (Contains):

Library Source

Category

Modality

Availability

Exchange Store

All

All

All

+

Announcement

By OneStream v1.0.0

Details

The Announcement Content Block is a text box that allows designers to display important announcements for various users. You can use Parameters for things such as Users or User Groups, Time, Scenario, etc. This block is ideal for landing pages or home screens or can be embedded into a Dashboard alongside additional content.

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BI Viewer

By OneStream v1.0.0

Details

The BI Viewer Content Block uses pre-existing Data Adapters and the BI Viewer Designer to allow users to create their own visualizations. Specific Data Adapter(s) are assigned to the block and can query data both internally and externally. Parameter settings are automatically generated if the Data Adapter contains Parameters. You can also add or remove Parameters as needed. Once configured, users will have a data-controlled designer to create vibrant visualizations.

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BI Viewer Embedded

By OneStream v1.0.0

Details

The BI Viewer Embedded Content Block uses pre-existing Data Adapters and the BI Viewer Designer to allow users to create their own visualizations. This block is almost identical to the BI Viewer Content Block but was designed to be embedded and display along-side other Components on a Dashboard. This makes it ideal for drill-down analysis. The borders were removed, and the Dashboard Type is Embedded to allow easy integration and the ability to pass Parameters.

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Book Viewer

By OneStream v1.0.0

Details

The Book Viewer content block enables users to view and navigate through PDF Report Books directly within the page. Designers configure which Report Book to display to the user giving them easy access to important documents and/or reports.

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Buttons

By OneStream v1.0.0

Details

The Buttons Content Block lets you configure multiple buttons for triggering POV and Navigation Actions. The buttons display in a grid-like layout on the page for an organized and clean appearance. Button actions are executed by user-click.

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Cube View Advanced

By OneStream v1.0.0

Details

The Cube View Advanced content block is used to display a Cube View on a page. Cube Views can be configured to display filters as Combo Boxes or Member Selectors for dynamic member selection. The filters are dynamically generated based on parameters in the Cube View. Additionally, buttons can be configured to Save upon data entry and/or run calculations and Data Management Sequences.

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Cancel

Items that are not available with the current license have a lock  icon. Contact your representative for pricing information.

TIP: Use the **Filter (Contains)** field and the **Library Source**, **Category**, **Modality**, and **Availability** drop-down menus to filter for a Content Block.

TIP: Click **Details** for more information about the Content Block.

NOTE: Content Blocks are configured on the Designer tab. For instructions, see the *Content Block Guide* in the Content Library on the Details page.

To link a Content Block that was created on Content Management to a Page, follow the steps to link existing content from a dashboard. See [Link Existing Content from a Dashboard](#).

TIP: On the Content Management page, the navigation tree uses the following naming convention: XLI_Page_{ContentBlockname}_{auto-increment}. On the Navigation page, the navigation tree uses the following naming convention: XLI_C_{ContentBlockname}_{auto-increment}_{(Main)}. When linking an existing Content Block, be aware of the different naming conventions to identify the correct item.

Edit a Content Block Description

A Content Block description is the name of the Content Block that displays in the navigation trees on the Content Management and Navigation pages. Descriptions are optional. If no description is entered, the Maintenance Unit name displays instead.

To edit a Content Block description, follow these steps:

1. In the navigation tree, select the Content Block.
2. Click the **Edit the Selected Item** icon.

Content Management



Upgrade

3. In the **Block Settings** slide-out panel, in the **Description** field, add or edit the description.
4. Click the **Save** button.

NOTE: Content Blocks are configured on the Designer tab. For instructions, see the *Content Block Guide* in the Content Library on the Details page.

Upgrade Content Blocks

You can individually upgrade eligible Content Blocks to the latest version to adopt the latest functionality and fixed issues.

See the following sections:

- [Compatibility Requirements](#)
- [View Upgrade Availability for Content Blocks](#)
- [Upgrade a Content Block](#)
- [Library Source Filter](#)
- [Upgrade Status Filter](#)
- [Force Upgrade](#)

Compatibility Requirements

To upgrade Content Blocks, ensure the following compatibility requirements are met:

- Minimum platform version required by the Content Block
- Minimum Genesis version required by the Content Block
- Both the current and new Content Blocks must require a minimum of Genesis Version 2.0.0 or later.

TIP: If the current Content Block requires a minimum version earlier than Genesis Version 2.0.0, an administrator may be able to force upgrade the Content Block. See [Force Upgrade](#).

View Upgrade Availability for Content Blocks

1. Click **Upgrade**.

Content Management



Upgrade

2. In the **Upgrade Content Blocks** slide-out panel, by default, each injected Content Block available for upgrade is displayed, organized by type. Review upgrade information.

Upgrade Content Blocks



Review the content blocks eligible for upgrade, then initiate the upgrade process.

Library Source **a**

Upgrade Status **b**

Genesis Instance

Needs Upgrade

Content Block		Version in Use d	Latest Available e	Upgrade Status f
AdvancedDashboardLayouts			2.0.0 Min. PV9.0.0 GV2.0.0	
AdvancedDashboardLayouts_1	c Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
AdvancedDashboardLayouts_3	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
CubeViewAdvanced			2.0.0 Min. PV9.0.0 GV2.0.0	
CubeViewAdvanced_10	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
CubeViewAdvanced_11	Info	1.2.0 Min. PV9.0.0 GV1.0.0		Upgrade
CubeViewAdvanced_9	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
Manufacturing Assumptions	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade

K < 1 > X

Rows 1-21 of 21

[Close](#)

- a. **Library Source:** See [Library Source Filter](#).
- b. **Upgrade Status:** See [Upgrade Status Filter](#).
- c. **Info:** Click to view the Block Settings slide-out panel, which includes the description and the parents and children of the Content Block.

NOTE: Parent Content Blocks located outside the current instance are not listed.

- d. **Version in Use:** Current Content Block version and minimum platform and Genesis versions required
 - e. **Latest Available:** Newest Content Block version available with minimum platform and Genesis versions required
 - f. **Upgrade Status:** Indicates whether the Content Block can be upgraded
3. (Optional) Click **Info** to view the **Block Settings** slide-out panel.

Block Settings



Display Settings

Block XLI_Page_CubeViewAdvanced_1

Description Manufacturing Assumptions

Is Added in These Pages or Blocks

 Manufacturing [Home > Assumptions]

Close

Upgrade a Content Block

When all requirements are met, follow these steps to review relevant information and upgrade a Content Block. See [Compatibility Requirements](#).

1. Click **Upgrade**.

Content Management



Upgrade

2. In the **Upgrade Content Blocks** slide-out panel, by default, each injected Content Block available for upgrade is displayed, organized by type. Review upgrade availability. See [View Upgrade Availability for Content Blocks](#).

TIP: You can filter the list to view specific Content Blocks. See [Library Source Filter](#) and [Upgrade Status Filter](#).

3. In the row for the Content Block, click the **Upgrade** button.

Upgrade Content Blocks

Review the content blocks eligible for upgrade, then initiate the upgrade process.

Library Source

Genesis Instance

Upgrade Status

Needs Upgrade

Content Block		Version in Use	Latest Available	Upgrade Status
AdvancedDashboardLayouts			2.0.0 Min. PV9.0.0 GV2.0.0	
AdvancedDashboardLayouts_1	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
AdvancedDashboardLayouts_3	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
CubeViewAdvanced			2.0.0 Min. PV9.0.0 GV2.0.0	
CubeViewAdvanced_10	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
CubeViewAdvanced_11	Info	1.2.0 Min. PV9.0.0 GV1.0.0		Upgrade
CubeViewAdvanced_9	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade
Manufacturing Assumptions	Info	1.1.0 Min. PV9.0.0 GV1.0.0		Upgrade

K < 1 > X

Rows 1-21 of 21

Close

- In the **Confirm** slide-out panel, click the **Confirm** button.

Library Source Filter

In the **Upgrade Content Blocks** slide-out panel, use the **Library Source** filter to identify the source for new Content Block versions.

- Exchange Store:** This is the default option for cloud environments and displays the centralized library of up-to-date Content Blocks. You must enable Library Service to use this live exchange store. See [Enable Library Service](#).

TIP: If Exchange Store is selected, you can view details about the latest Content Block versions. In the Latest Available column, click a Content Block version number to view the documentation, including release notes.

- Select the name of the Genesis instance to display the library of Content Blocks stored within the Genesis Workspace. These Content Blocks were manually downloaded from OneStream Solution Exchange and imported into Genesis.

Upgrade Status Filter

In the **Upgrade Content Blocks** slide-out panel, use the **Upgrade Status** filter to display Content Blocks based on upgrade availability.

- **Needs Upgrade:** This is the default option and displays only the Content Blocks available for upgrade.
- **All:** Select to display all Content Blocks.
- **Up To Date (No Action):** Select to display only Content Blocks on the latest available version.
- **Blocked (Not Compatible):** Select to display only the Content Blocks that cannot be upgraded because the compatibility requirements are not met. See [Compatibility Requirements](#).
- **Unknown (Not Found):** Select to display only the Content Blocks that cannot be found in the selected library source.

Force Upgrade

Force upgrade is intended for Content Blocks whose current injected version requires a minimum earlier than Genesis Version 2.0.0. The only alternative is to manually inject and reconfigure the new version.

CAUTION: Force upgrade bypasses standard validation. Configuration settings and generated artifacts may not be preserved. Only force upgrade when the risk of losing existing configurations outweighs the effort of manually injecting and reconfiguring the new Content Block version.

Requirements

To force upgrade Content Blocks, ensure the following requirements are met:

- Only system or application administrators can force upgrade a Content Block. See [Solution Administration](#).
- Enable Force Upgrade Mode. See [Enable Force Upgrade Mode for Content Blocks](#).
- Ensure the following compatibility requirements are met:
 - Minimum platform version required by the Content Block
 - Minimum Genesis version required by the Content Block
 - The new Content Block must require a minimum of Genesis Version 2.0.0 or later.

Force Upgrade a Content Block

When all requirements are met, follow these steps to force upgrade a Content Block. See [Requirements](#).

1. Click **Upgrade**.

Content Management



Upgrade

2. In the **Upgrade Content Blocks** slide-out panel, in the row for the Content Block, click the **Upgrade** button.

NOTE: When Force Upgrade Mode is enabled and you click Upgrade, the system automatically determines the method. If the Content Block meets the standard upgrade requirements, a standard upgrade runs. If only force upgrade requirements are met, a force upgrade runs instead. You do not need to select the method manually.

3. In the **Confirm** slide-out panel, click the **Confirm** button.

Eligible Content Blocks

You can force upgrade the following Content Blocks:

- Announcement
- Book Viewer
- Cube View Tree View
- Document Editor
- Document Tree
- File Viewer
- Image Display
- Rich Text
- Spreadsheet Tree
- Webpage Viewer

Colors

On the Colors page, you can customize color sets to apply to the home box, navigation bar, page bar, title bar, and images in the Genesis instance that display in the end-user view.

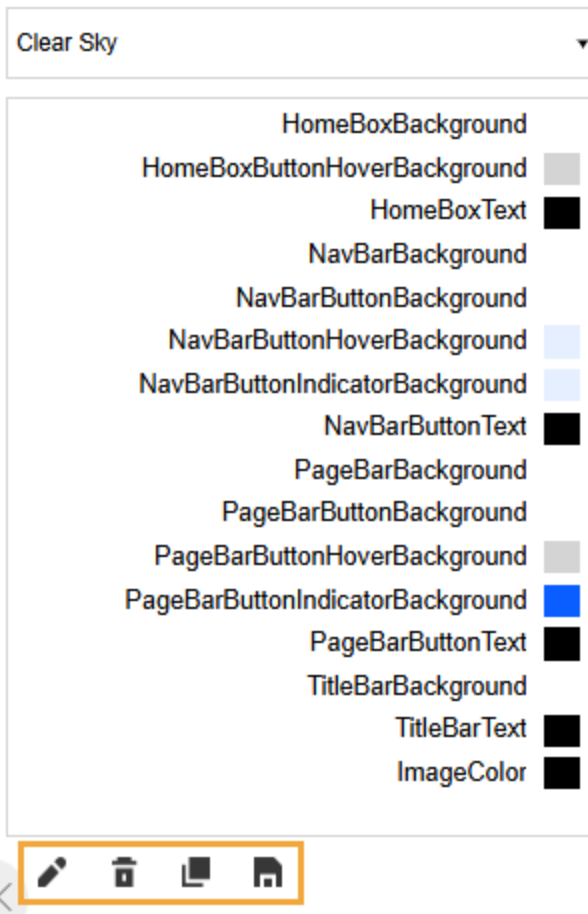
The Colors page is organized into the following sections:

- **Color Options:** In this panel, you can view color sets and their properties. Use the toolbar to edit, delete, copy, and apply a color set.

Color Options

Current Selection: Clear Sky

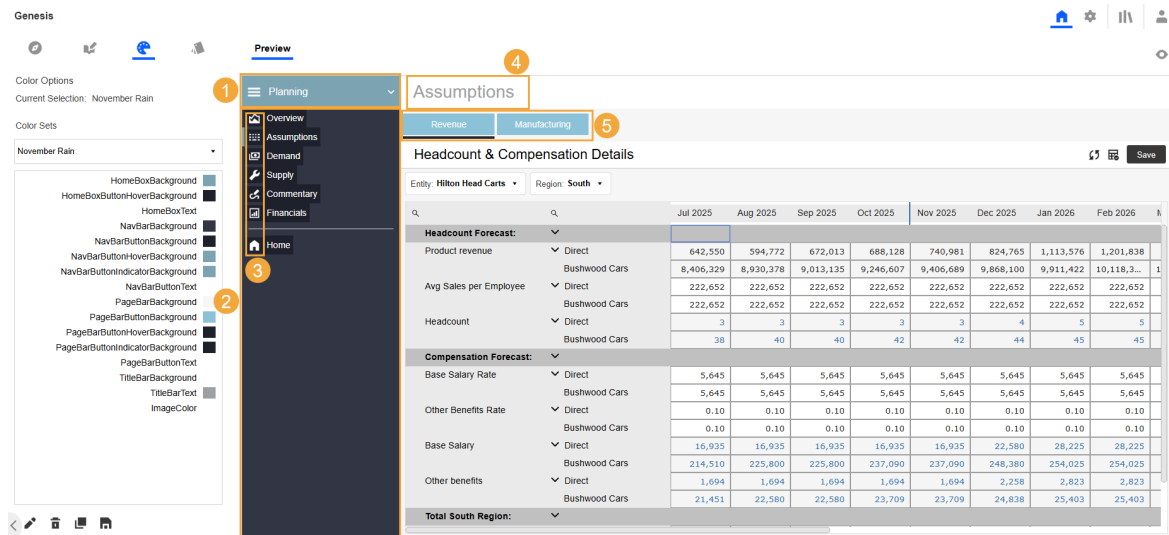
Color Sets



See the following sections:

- Apply a Color Set
- Edit a Color Set
- Delete a Color Set
- Copy a Color Set
- **Preview:** This tab displays a preview of the end-user view with the saved color set applied.

In the upper right, you can set your preference to turn the preview on (click the **Show Preview**  icon) or off (click the **Hide Preview**  icon).



1. Home box
2. Navigation bar
3. Images
4. Title bar
5. Page bar

Color Set Properties

These properties set the color theme in the Genesis instance. You can edit these properties as needed. See [Edit a Color Set](#).

Home Box

- **HomeBoxBackground:** Background color of the Application Group drop-down menu
- **HomeBoxButtonHoverBackground:** Color change when you hover over an item in the Application Group drop-down menu
- **HomeBoxText:** Text color of items in the Application Group drop-down menu

Navigation Bar

- **NavBarBackground:** Background color of the navigation bar
- **NavBarButtonBackground:** Background color of items on the navigation bar
- **NavBarButtonHoverBackground:** Color change when you hover over an item on the navigation bar
- **NavBarButtonIndicatorBackground:** Color of the indicator bar that highlights a selected item on the navigation bar
- **NavBarButtonText:** Text color of items on the navigation bar

See [Navigation Bar](#).

Page Bar

- **PageBarBackground**: Background color of the page bar
- **PageBarButtonBackground**: Background color of tabs on the page bar
- **PageBarButtonHoverBackground**: Color change when you hover over a tab on the page bar
- **PageBarButtonIndicatorBackground**: Color of the indicator bar that highlights a selected item on the page bar
- **PageBarButtonText**: Text color of tabs on the page bar

See [Page Bar](#).

Title Bar

- **TitleBarBackground**: Background color of the title bar
- **TitleBarText**: Text color of items on the title bar

Image

- **ImageColor**: Color of images on the navigation and page bars

Apply a Color Set

Apply a color set to update the Genesis instance with the selected colors.

1. From the **Color Sets** drop-down menu, select an option. The properties display in the Color Options panel. See [Color Set Properties](#).
2. Click the **Apply Selected ColorSet to Application Foundation** icon to apply the color set and view the updates in the Preview tab.



Edit a Color Set

1. From the **Color Sets** drop-down menu, select an option.
2. Click the **Edit the Selected ColorSet** icon.



3. On the **ColorSet Editor** slide-out panel, in the field for each option, update the properties.
See [Color Set Properties](#).

- Enter hex color values using the format #FF000000 or a OneStream color name, which is a name from the standard list of colors used in OneStream, for example, for a button component.
- To make an option transparent, type **Transparent**.
- To update **ImageColor**, from the drop-down menu, select **Black** or **White**.

ColorSet Editor



Edit ColorSet Values

HomeBoxBackground		Transparent
HomeBoxButtonHoverBackground		#FFD4D4D4
HomeBoxText		Black
NavBarBackground		Transparent
NavBarButtonBackground		Transparent
NavBarButtonHoverBackground		#FFE6EFFF
NavBarButtonIndicatorBackground		#FFE6EFFF
NavBarButtonText		Black
PageBarBackground		Transparent
PageBarButtonBackground		Transparent
PageBarButtonHoverBackground		#FFD4D4D4
PageBarButtonIndicatorBackground		#FF0A5DFF
PageBarButtonText		Black
TitleBarBackground		Transparent
TitleBarText		Black
ImageColor		Black ▼

Save

Cancel

- Click the **Save** button.

TIP: Apply a color set to update the Genesis instance. See [Apply a Color Set](#).

Delete a Color Set

You can delete color sets that are no longer needed to keep the list updated.

CAUTION: If you delete a color set, the action cannot be reversed.

To delete a color set, follow these steps:

1. From the **Color Sets** drop-down menu, select an option.
2. Click the **Delete the Selected ColorSet** icon.



3. In the **Confirm Delete** slide-out panel, click the **Delete** button.

Copy a Color Set

Copy a color set to create a new color set based on an existing one.

1. From the **Color Sets** drop-down menu, select an option.
2. Click the **Copy the Selected ColorSet** icon.



3. On the **ColorSet Editor** slide-out panel, enter a unique name for the new color set.

ColorSet Editor ×

Copy ColorSet

ColorSet Name:

Save Cancel

4. Click the **Save** button.
5. (Optional) Update the new color set. See [Edit a Color Set](#).

TIP: Apply a color set to update the Genesis instance. See [Apply a Color Set](#).

Styles

On the Styles page, you can customize the display and spacing of the navigation bar and page bar in the end-user view of the Genesis instance.

The Styles page is organized in the following sections:

- In the left panel, you can view and configure style settings and apply them to the navigation bar and page bar.

Genesis



Navigation Bar

Application Group Display
☒ Menu ☐ Image

Width
250

Button Height
Small

Selected State Type
☒ Indicator ☐ Highlight

Indicator Size
☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness
☐ Thin ☐ Standard ☒ Thick

Page Bar

Button Width
145

Indicator Size
☐ Tiny ☐ Small ☐ Medium ☒ Large

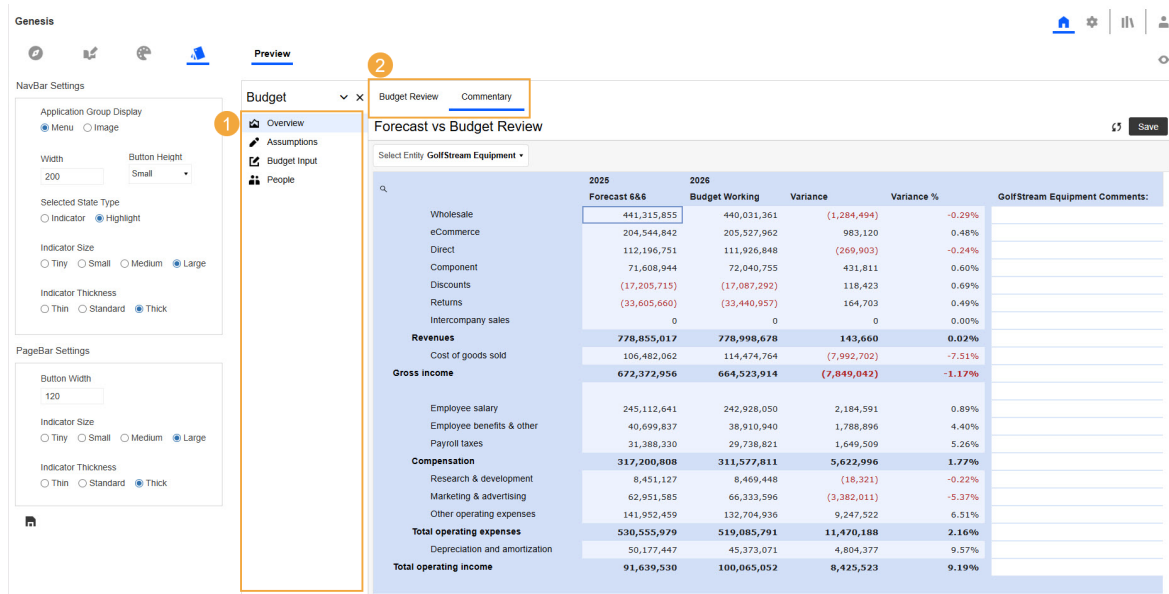
Indicator Thickness
☐ Thin ☐ Standard ☒ Thick



- **Preview:** This tab displays a preview of the end-user view with the selected style settings applied to the navigation bar and page bar.

In the upper right, you can set your preference to turn the preview on (click the **Show**

Preview  icon) or off (click the **Hide Preview**  icon).



1. Navigation bar is displayed on the left side of the page.
2. Page bar is displayed across the top of the page.

Configure Style Settings

Configure style settings before applying them to a Genesis instance.

Navigation Bar

These settings customize the display of the Application Groups and Navigation Groups in the navigation bar.

Application Group Display

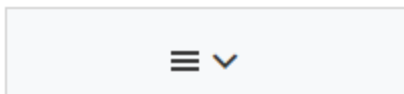
- **Menu:** Select to display the Application Group description in the navigation bar drop-down menu.

Preview



- **Image:** Select to display a menu image for the Application Group in the navigation bar drop-down menu. Use this option to reduce the size of the navigation bar.

Preview



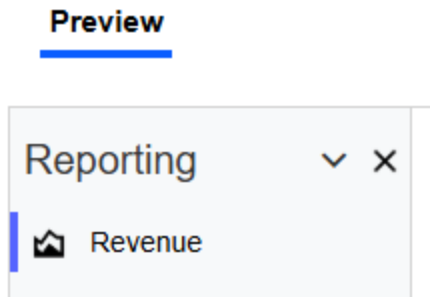
Width: Enter the number of pixels to set the width of the navigation bar.

Button Height: Select the height of the space for each item in the navigation bar.

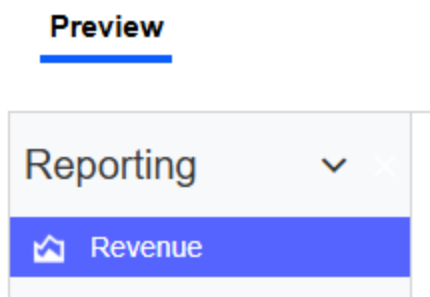
TIP: Increase the navigation bar width or button height to accommodate longer names or larger font sizes.

Selected State Type

- **Indicator:** Select to include a vertical indicator bar next to the selected item in the navigation bar.



- **Highlight:** Select to highlight the background of the selected item in the navigation bar.



NOTE: The color listed in `NavBarButtonIndicatorBackground` on the Colors page is used for the vertical indicator bar or highlight. See [Color Set Properties](#).

Indicator Size: If you selected Indicator as the Selected State Type, choose a length for the vertical bar: **Tiny**, **Small**, **Medium**, or **Large**.

Indicator Thickness: If you selected Indicator as the Selected State Type, choose a thickness for the vertical bar: **Thin**, **Standard**, or **Thick**.

Page Bar

These settings customize the display of the Pages in the page bar.

Button Width: Enter the number of pixels to set the width of the page bar tabs.

TIP: Increase the button width to accommodate longer page names.

Indicator Size: Select a length for the horizontal bar displayed under the selected page bar tab: **Tiny, Small, Medium, or Large.**

Indicator Thickness: Select a thickness for the horizontal bar displayed under the page bar tab: **Thin, Standard, or Thick.**

Apply Style Settings

After you configure style settings, apply them to a Genesis instance.

1. In the left panel, select the style settings. See [Configure Style Settings](#).
2. Click the **Save your changes.** icon to apply the style and view the updates in the Preview

tab.

Genesis



Navigation Bar

Application Group Display

☒ Menu ☐ Image

Width

250

Button Height

Small

Selected State Type

☒ Indicator ☐ Highlight

Indicator Size

☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness

☐ Thin ☐ Standard ☒ Thick

Page Bar

Button Width

145

Indicator Size

☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness

☐ Thin ☐ Standard ☒ Thick



Settings

On the Settings page, solution administrators manage the Genesis instance and its content libraries.

- To manage a library of images, color sets, or Content Blocks, see [Library Management](#).
- To create a new instance with the default configuration, see [Create a New Instance](#).
- To update an instance, see [Upgrade an Instance](#).
- To create backups and restore an instance, see [Back Up an Instance](#) and [Restore an Instance](#).
- To set the default state for the Preview tab on Designer Home, see [Set the Default for the Preview Tab](#).

NOTE: There are security requirements for Settings. See [Solution Administration](#).

Library Management

On the Library Management page, you can import and export the full library of images, color sets, and Content Blocks. You can use this option to update an entire library rather than individual items.

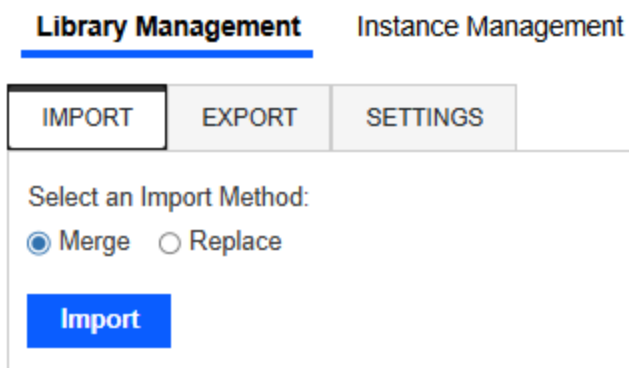
Example: If you customize several images to use in a Development instance and want to use them in production, you can export the image library from the Development instance and import it to the Production instance.

In Library Management, you can also manage the service for the Content Library.

Import a Library

You can import a library by either merging or replacing content.

1. In **Settings > Library Management**, click the **IMPORT** tab.
2. Select the import method.
 - Select **Merge** to:
 - Add new imported items to the library.
 - Update existing items to the imported items.
 - Keep current items that are not in the imported library.
 - Select **Replace** to replace the current library with the imported library. All current library items will be deleted, and all imported library items will be added.

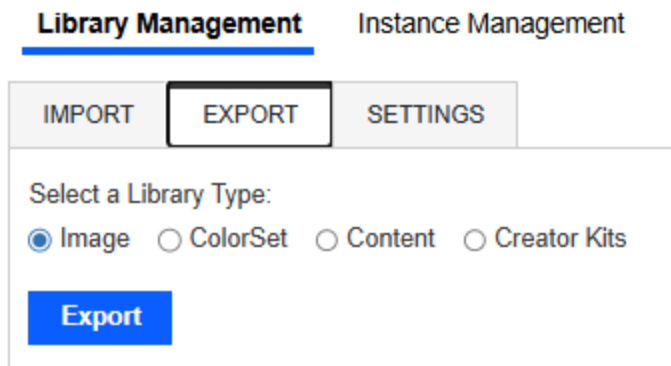


The screenshot shows the 'Library Management' section of the Genesis Designer interface. It features two tabs: 'Library Management' (active, underlined in blue) and 'Instance Management'. Below the tabs is a sub-menu with three buttons: 'IMPORT' (highlighted with a black border), 'EXPORT', and 'SETTINGS'. Under the 'IMPORT' button, the text 'Select an Import Method:' is displayed, followed by two radio button options: 'Merge' (selected, indicated by a blue dot) and 'Replace'. At the bottom of this section is a blue 'Import' button.

3. Click the **Import** button.
4. Select the file to import.
5. Click the **Open** button.

Export a Library

1. In **Settings > Library Management**, click the **EXPORT** tab.
2. Select the library type to export: **Image**, **ColorSet**, **Content**, or **Creator Kits**.



3. Click the **Export** button.
4. The library will be exported, and a dialog box will display with the file location. To close the dialog box, click the **OK** button.

Enable Library Service

These are the sources for the Content Library:

- **Exchange Store:** A centralized registry and distribution service for Content Blocks. It is a cloud marketplace connected to Genesis that enables you to browse an up-to-date library of Content Blocks.

The Exchange Store is available to cloud-hosted environments except FedRAMP environments. It is turned off by default.

- **Genesis Instance Workspace:** A library of Content Blocks stored within the Genesis Workspace that is managed by solution administrators. Content Blocks are manually downloaded from OneStream Solution Exchange and imported into Genesis. This source does not require integration with the centralized library service.

The Genesis Instance Workspace is available to all environments. It is required for on-premises environments and FedRAMP cloud environments.

To update the library service, follow these instructions:

1. In **Settings > Library Management**, click the **SETTINGS** tab.
2. Under **Enable the Library Service**, select an option:
 - Select **Yes** to enable integration with the centralized library of Content Blocks in the Exchange Store. You will still have access to the library in the Genesis Instance Workspace.
 - Select **No** to turn off the integration with the Exchange Store. Only the library in the Genesis Instance Workspace will be available.

Library Management Instance Management

IMPORT EXPORT SETTINGS

Enable the Library Service:

☒ Yes ☐ No

Enable Force Upgrade Mode for Content Blocks

Force upgrade is intended for injected Content Blocks that require a minimum version earlier than Genesis Version 2.0.0. The only alternative is to manually inject and reconfigure the new version.

CAUTION: Force upgrade bypasses standard validation. Configuration settings and generated artifacts may not be preserved. Only force upgrade when the risk of losing existing configurations outweighs the effort of manually injecting and reconfiguring the new Content Block version.

1. In **Settings > Library Management**, click the **SETTINGS** tab.
2. Under **Block Force-Upgrade Mode**, turn the option to force upgrade on (select **Enable**) or off (select **Disable**).

The screenshot shows the 'Library Management' tab selected, with sub-tabs 'IMPORT', 'EXPORT', and 'SETTINGS'. The 'SETTINGS' sub-tab is active. Under 'Enable the Library Service', the 'Yes' radio button is selected. The 'Block Force-Upgrade Mode' section is highlighted with an orange border. It includes a description: 'Allows administrators to force-upgrade blocks with a minimum Genesis version of 1.0.0 that don't support the standard upgrade process.' and the 'Enable' radio button is selected.

See [Force Upgrade](#).

Instance Management

Each instance of Genesis is a unique Workspace. On the Instance Management page, you can create, upgrade, back up, and restore an instance. You can also set the default state for the Preview tab in Designer Home.

Create a New Instance

You can create a new instance of Genesis based on the needs of your application or environment.

Example: Create separate instances for Development and Production, or create a customized instance for a specific financial workflow, such as Planning or Reporting.

When you create a new instance of Genesis, it will have the default configuration. It is not a copy of an existing instance.

1. In **Settings > Instance Management**, click the **CREATE** tab.
2. In the **Enter Instance Name** field, enter a new name for the instance.

The screenshot shows the 'Instance Management' section of the software interface. At the top, there are two tabs: 'Library Management' and 'Instance Management', with the latter being the active tab. Below the tabs is a row of four buttons: 'CREATE', 'UPGRADE', 'BACKUP AND RESTORE', and 'UTILITIES'. The 'CREATE' button is highlighted. Below this row is a text input field labeled 'Enter Instance Name:' containing the text 'Production'. Below the input field is a blue button labeled 'Create'.

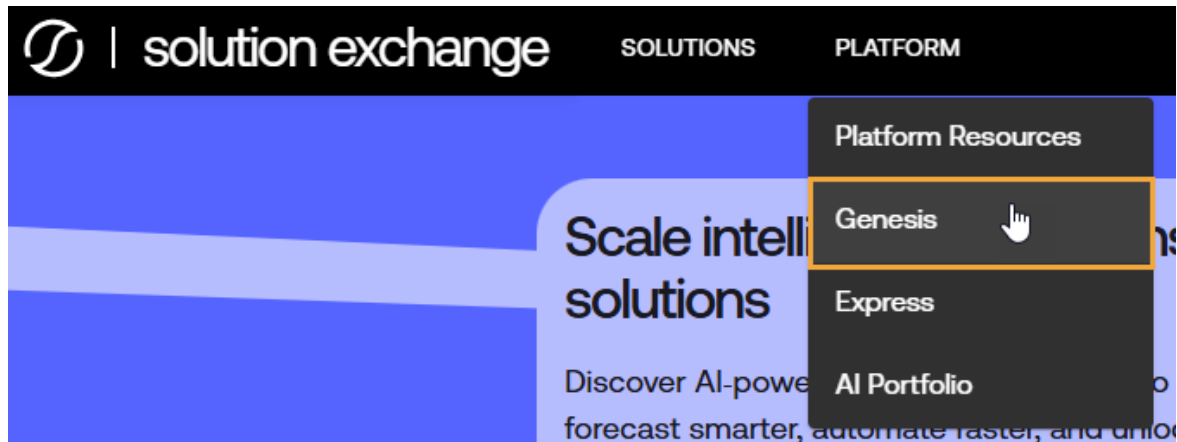
NOTE: The instance name must be unique and use alphanumeric characters (A–Z, a–z, and 0–9). The maximum number of characters is 80. The name cannot include symbols or reserved words. See [Reserved Words](#).

3. Click the **Create** button.

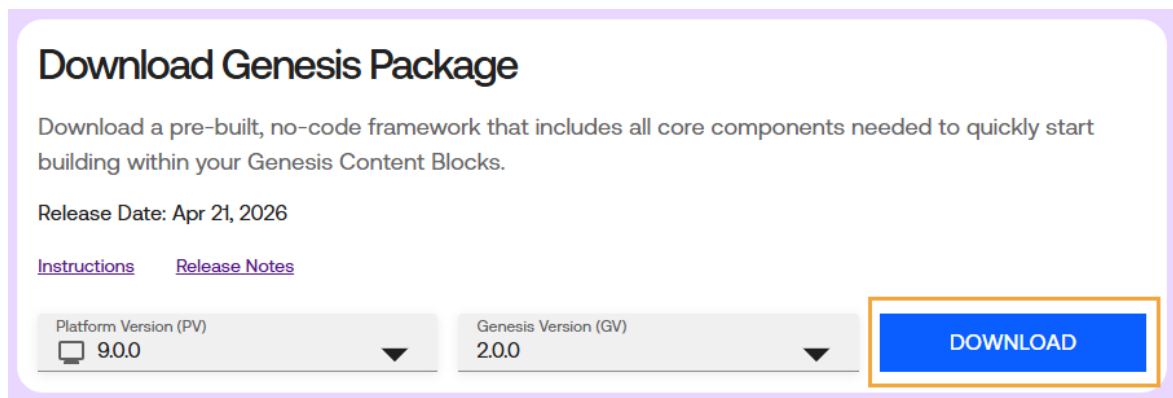
Upgrade an Instance

Upgrade an instance of Genesis to the latest release.

1. Go to OneStream [Solution Exchange](#).
2. In the top navigation menu, go to **PLATFORM** > **Genesis**.



3. On the **Genesis** page, from the **Download Genesis Package** drop-down menus, select the appropriate platform version and the most recent Genesis version.
4. Select the **DOWNLOAD** button to download the Genesis solution.



5. Log in to OneStream.
6. Go to the Genesis instance > **Settings** > **Instance Management** > **UPGRADE**.
7. Select the **Upload Upgrade Instance** icon.

Library Management **Instance Management**

CREATE **UPGRADE** BACKUP AND RESTORE UTILITIES

Current Version: PV850-SV100

Select a Genesis Solution File

Begin Upgrade

8. Select the new solution package, and select the **Open** button.

IMPORTANT: The file must be a .zip Genesis package for an updated version.
The current version is listed on the **UPGRADE** page.

9. When the selected file name displays in the **Select a Genesis Solution File** field, select the **Begin Upgrade** button.

IMPORTANT: After you click the Begin Upgrade button, the upgrade is in progress. Do not navigate away from the page while the upgrade is in progress.

NOTE: As part of the upgrade, backup files of the instance are created and saved in the location specified on the BACKUP AND RESTORE page. These backup files can be used to restore the instance to a previous state. See [Back Up an Instance](#).

10. When the **Upgrade in Progress** screen displays, select the **Complete Upgrade** button.

IMPORTANT: Do not navigate away from the page until the upgrade is complete.

11. When the upgrade is complete, a dialog box will display with a confirmation. To close the dialog box, select the **OK** button.

Back Up an Instance

You can back up an instance to ensure it can be restored in the future if needed. See [Restore an Instance](#).

When you back up an instance, you can choose to save either the full Genesis Workspace (Full backup) or only the customizations and configurations (App Settings backup).

1. In **Settings > Instance Management**, click the **BACKUP AND RESTORE** tab.
2. In the **Location** field, there is a default location for the backup files to be saved in OneStream.

NOTE: To update the location, click the Change button, select a new folder in the Application Database, and click the Select Folder button.

3. Under **Backup**, select the type of backup file to create.
 - **Full:** Each instance of Genesis is a unique Workspace. Full is an export of the full Genesis Workspace. It is a compressed .xml file. This option enables you to revert completely to a previous state.
 - **App Settings:** This file includes customizations and configurations made in Genesis. This includes the Application Group settings, Navigation Groups and settings, Pages and settings, Page links, the selected color set, and style settings. It is a compressed .json file. This option enables you to copy the customizations and configurations to another instance.

Library Management

Instance Management

CREATE

UPGRADE

BACKUP AND RESTORE

UTILITIES

Location

Documents/Public/GEN

Change

Backup

Select Backup Type:

☒ Full ☐ App Settings

Create

4. Click the **Create** button.

Restore an Instance

If you have a backup file, you can use it to restore an instance. See [Back Up an Instance](#).

When you restore an instance, it will replace either the full Genesis Workspace (Full backup) or the customizations and configurations (App Settings backup).

1. In **Settings > Instance Management**, click the **BACKUP AND RESTORE** tab.
2. Under **Restore**, select the type of backup file to restore the instance.
 - **Full**: This file is the full Genesis Workspace. It is a compressed .xml file. This option enables you to revert completely to a previous state.
 - **App Settings**: This file includes customizations and configurations made in Genesis. This includes the Application Group settings, Navigation Groups and settings, Pages and settings, Page links, the selected color set, and style settings. It is a compressed .json file. This option enables you to copy the customizations and configurations to another instance.
3. In the **Select File** drop-down menu, select a backup file. The field will display a list of files from the default location that match the selected backup file type.
4. Click the **Restore** button.

Set the Default for the Preview Tab

In Designer Home, the Preview tab displays the preview of the end-user view. You can set the default state for the instance to turn the preview on or off.

1. In **Settings > Instance Management**, click the **UTILITIES** tab.
2. Under **Default Preview State**, select the option to set as the default Preview tab display for the instance.

- **Show:** Displays a preview of the end-user view
- **Hide:** Displays a message indicating the preview is disabled

Library Management

Instance Management

CREATE

UPGRADE

BACKUP AND RESTORE

UTILITIES

Default Preview State

☐ Show ☒ Hide

NOTE: The default setting is applied for all users when the Preview pane is loaded, but users can turn the preview on (click the **Show Preview**  icon) or off (click the **Hide Preview**  icon).

Image Library

Report designers use the Image Library to manage the full list of images. These images can be displayed in the navigation bar and page bar and some Content Blocks.

Forecast vs Budget Review

Select Entity: **GolfStream Equipment**

	2025 Forecast 6&6	2026 Budget Working	Variance	Variance %	GolfStream Equipment Comments:
Wholesale	441,315,855	440,031,361	(1,284,494)	-0.29%	
eCommerce	204,544,842	205,527,962	983,120	0.48%	
Direct	112,196,751	111,926,848	(269,903)	-0.24%	
Component	71,608,944	72,040,755	431,811	0.60%	
Discounts	(17,205,715)	(17,087,292)	118,423	0.69%	
Returns	(33,605,660)	(33,440,957)	164,703	0.49%	
Intercompany sales	0	0	0	0.00%	
Revenues	778,855,017	778,998,678	143,660	0.02%	
Cost of goods sold	106,482,062	114,474,764	(7,992,702)	-7.51%	
Gross income	672,372,956	664,523,914	(7,849,042)	-1.17%	
Employee salary	245,112,641	242,928,050	2,184,591	0.89%	
Employee benefits & other	40,699,837	38,910,940	1,788,896	4.40%	
Payroll taxes	31,388,330	29,738,821	1,649,509	5.26%	
Compensation	317,200,808	311,577,811	5,622,996	1.77%	
Research & development	8,451,127	8,469,448	(18,321)	-0.22%	
Marketing & advertising	62,951,585	66,333,596	(3,382,011)	-5.37%	
Other operating expenses	141,952,459	132,704,936	9,247,522	6.51%	
Total operating expenses	530,555,979	519,085,791	11,470,188	2.16%	
Depreciation and amortization	50,177,447	45,373,071	4,804,377	9.57%	
Total operating income	91,639,530	100,065,052	8,425,523	9.19%	

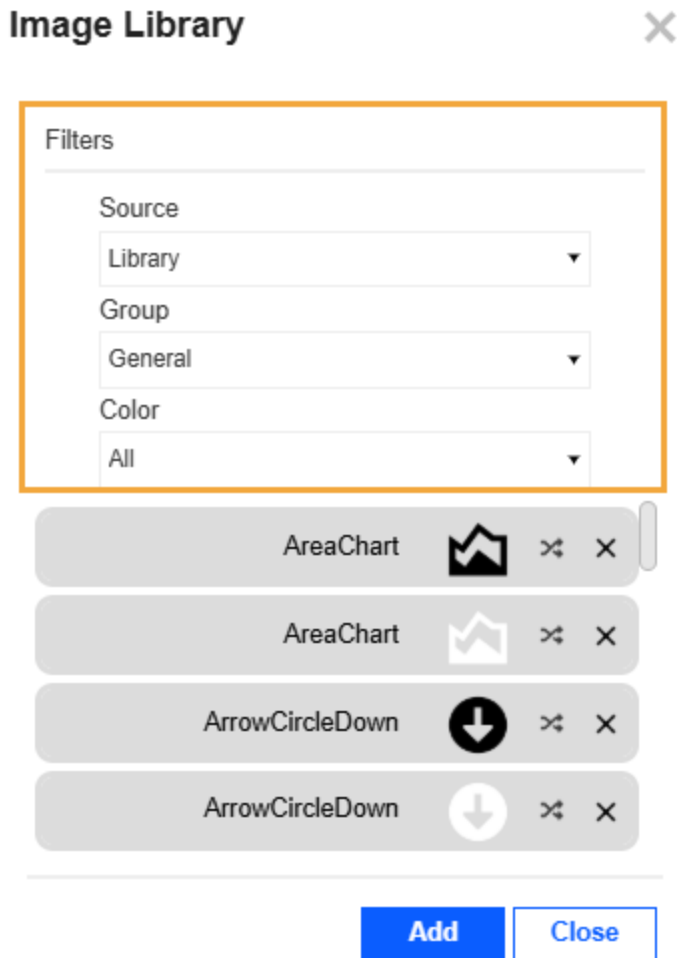
1. Navigation bar

2. Page bar

Each image has a black version and a white version. On the Colors page, you can change the ImageColor option to dynamically change the color of the images in the navigation bar and page bar. See [Colors](#). When you add or replace images in the library, if you want to retain that functionality, include both a black version and a white version.

NOTE: There are security requirements for the Image Library. See [Genesis Designer](#) and [Image Library](#).

Use the **Source**, **Group**, and **Color** drop-down menus to filter the list of images.

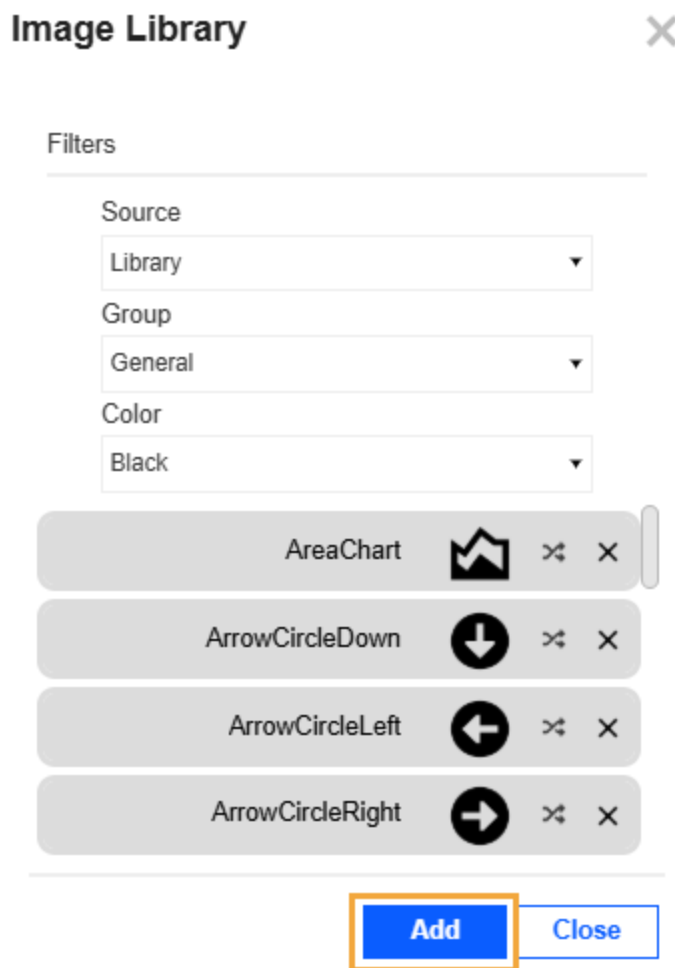


In the Image Library, you can add, replace, and delete images.

Add an Image

1. Click the **Image Library** icon.
2. In the **Image Library** slide-out panel, set the **Source**, **Group**, and **Color** drop-down menus to selections for the image to add. These selections will be used as the filter categories for the image. They cannot be set to **All**.

3. Click the **Add** button.

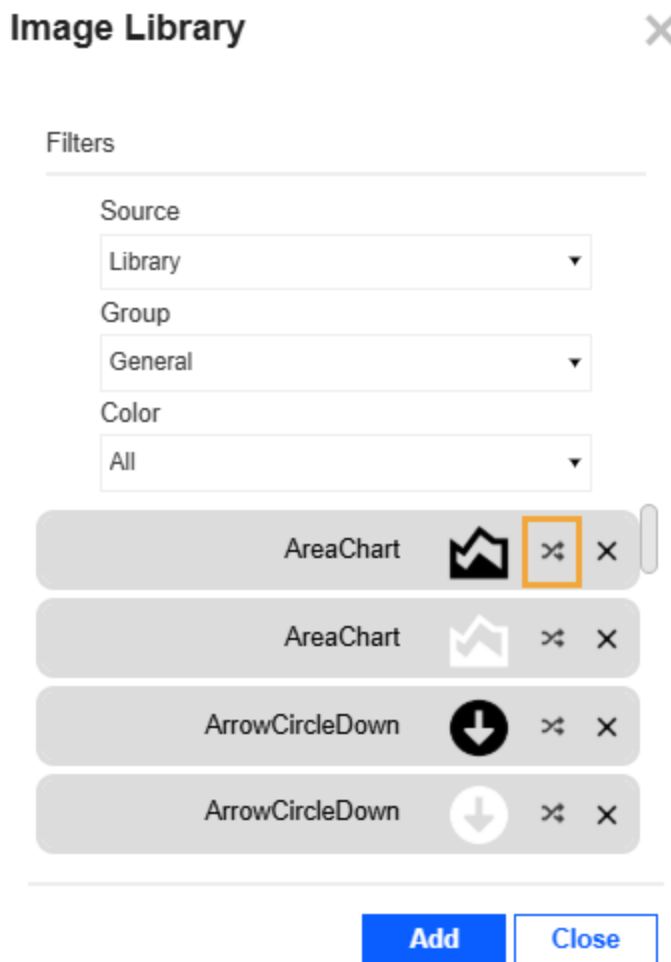


4. Select the .png image, and click the **Open** button.

Replace an Image

Replacing an image in the library will update it everywhere it displays in the instance.

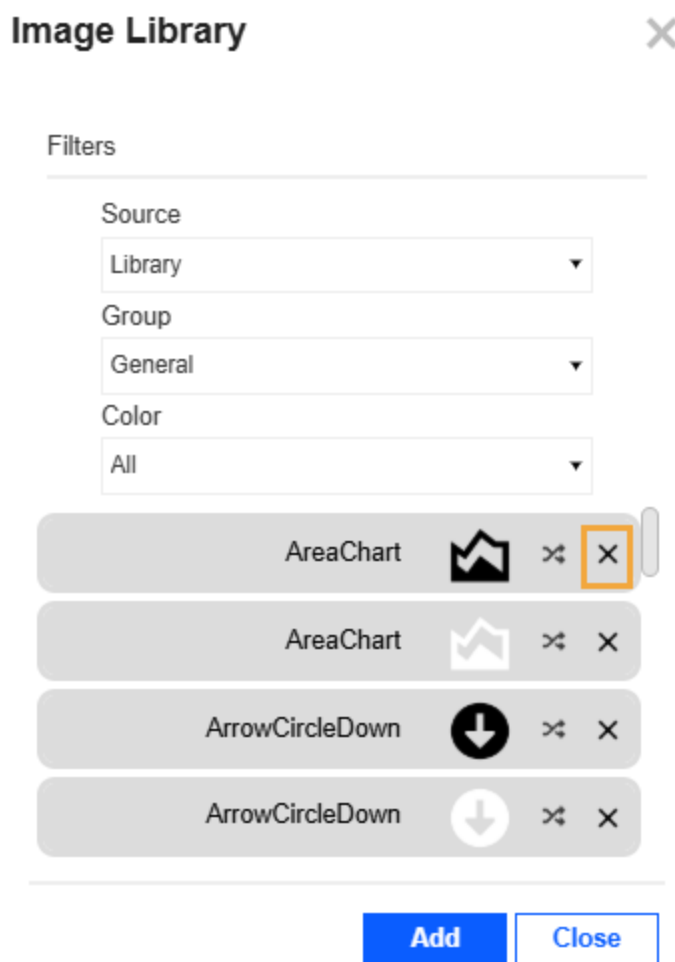
1. Click the **Image Library** button.
2. (Optional) In the **Image Library** slide-out panel, use the **Source**, **Group**, and **Color** drop-down menus to filter the list.
3. Next to the image, click the **Change the Selected Image** icon.



4. Select the .png image, and click the **Open** button.

Delete an Image

1. Click the **Image Library** icon.
2. (Optional) In the **Image Library** slide-out panel, use the **Source**, **Group**, and **Color** drop-down menus to filter the list.
3. Next to the image, click the **Delete the Selected Image** icon.



Glossary

The following terms and their definitions are specific to Genesis.

Term	Definition
Application Group	A group that can be customized to represent the breakdown of a user flow. The Application Groups available are Home, Admin, Config, and Help.
Content Block	A dashboard layout or component with configuration options.
Navigation Group	A group of one or more Pages. Navigation Groups are used to organize Pages into a process flow.
Page	A display of content. Pages have a one-to-one relationship with content, so you can only link one existing dashboard or inject one Content Block to each Page.

Security

This section includes the security requirements for access to Genesis Navigation and Genesis Designer as well as additional requirements to perform specific actions on these pages. Security requirements are also listed for solution administrators to install Genesis and manage libraries and instances in Settings. See these sections:

- [Genesis Navigation](#)
- [Genesis Designer](#)
- [Solution Administration](#)

Genesis Navigation

To access Genesis Navigation, you must be in the following security groups:

- Access Group on the Dashboard Profile {Genesisinstancename} Navigation. By default, it is set to Everyone.
- Access Group on the Genesis instance Workspace. By default, it is set to Everyone.

The following table includes additional security requirements to perform specific actions in Genesis Navigation.

Actions	Security Requirements
View Application Groups in the drop-down menu	• Access Group on the Application Group settings • Hide set to No on the Application Group settings
View a Navigation Group in the navigation bar or a Page in the page bar	• Access Group on the Navigation Group or Page settings • No Access Type set to Hide on the Navigation Group or Page settings • Hide set to No on the Navigation Group or Page settings You can configure the display of a Navigation Group in the navigation bar or a Page in the page bar for users without access. When these users select the item, they will see a message indicating they do not have access. To configure this option, follow these instructions in the settings: 1. In the Access Group drop-down menu, select the security group. 2. In the No Access Type drop-down menu, select ShowBanner. 3. In No Access Banner, type banner_NoAccess_(App)_(Main). 4. In the Hide drop-down menu, select No.
View linked content or an injected Content Block on a Page	You must have the security requirements of the content based on standard platform configuration to view the data and objects configured for the Page. For example, to view a Cube View, a user must have access to that Cube View and its cube data.

Genesis Designer

To access Genesis Designer, you must be in the following security groups:

- Access Group on the Dashboard Profile {Genesisinstancename} Designer. By default, it is set to Everyone.
- Access Group on the Genesis instance Workspace. By default, it is set to Everyone.

In addition, members of these security groups can also complete the following actions in Genesis Designer.

- On the Navigation page, you can edit Application Group, Navigation Group, and Page settings. You can also delete Navigation Groups, Pages, linked content, or injected Content Blocks.
- On the Colors page, you can view settings and apply, copy, edit, and delete color sets.
- On the Styles page, you can view and save settings.
- You can view the Image Library.

The following sections include additional security requirements to perform more actions in Genesis Designer. See these sections:

- [Navigation](#)
- [Content Management](#)
- [Image Library](#)

Navigation

The following table includes additional security requirements to perform specific actions in Genesis Designer > Designer Home > Navigation.

Actions	Security Requirements
• Add Navigation Groups and Pages • Link existing content to a Page • Inject a Content Block to a Page	Application security role ManageApplicationWorkspaces
Configure settings for injected Content Blocks	Any security requirements listed in the <i>Content Block Guide</i> , which is in the Content Library on the Details page and on OneStream Solution Exchange .
View content on the Preview tab	• Access Group on the Genesis Application Group, Navigation Group, and Page • Security requirements of the content based on standard platform configuration
View content on the Content tab	Security requirements of the content based on standard platform configuration

Content Management

The following table includes additional security requirements to perform specific actions in Genesis Designer > Designer Home > Content Management.

Actions	Security Requirements
Inject and upgrade Content Blocks	• Application security role ManageApplicationWorkspaces • Application security role AdministerApplicationWorkspaceAssemblies (required for Content Blocks with Assemblies)
Delete Content Blocks	Maintenance group on the Genesis instance Workspace

Image Library

The following table includes additional security requirements to perform specific actions in Genesis Designer > Image Library.

Actions	Security Requirements
• Add new images • Replace existing images	You must meet one of the following requirements: • System security group Administrators • Application security role AdministerApplication
Delete images	Maintenance Group on the Genesis instance Workspace

Solution Administration

To install Genesis or import Content Blocks, you must meet one of the following requirements:

Security

- System security group Administrators
- Application security role AdministerApplication and application user interface role ApplicationLoadExtractPage

To view the Settings page and manage the instance and libraries, you must be in the system security group Administrators.

Reserved Words

OneStream reserved words cannot be used to name instances of Genesis, Navigation Groups, or Pages.

- ?
- Account
- All
- Cons
- Consolidation
- Default
- DimType
- Entity
- EntityDefault
- Flow
- IC
- None
- Origin
- Parent
- POV
- Root

Reserved Words

- RootAccountDim
- RootEntityDim
- RootFlowDim
- RootScenarioDim
- RootUD1Dim
- RootUD2Dim
- RootUD3Dim
- RootUD4Dim
- RootUD5Dim
- RootUD6Dim
- RootUD7Dim
- RootUD8Dim
- Scenario
- Time
- UD1
- UD1Default
- UD2
- UD3
- UD4
- UD5
- UD6

Reserved Words

- UD7
- UD8
- Unknown
- View
- WF
- Workflow
- XFCommon

Help and Miscellaneous Information

Review this section for recommended display settings, package file name information, and considerations for modifications to solutions.

- [Display Settings](#)
- [Package Contents and Naming Conventions](#)
- [OneStream Solution Modification Considerations](#)

Display Settings

OneStream Solutions frequently require the display of multiple data elements for proper data entry and analysis. Therefore, the recommended screen resolution is a minimum of 1920 x 1080 for optimal rendering of forms and reports.

Additionally, OneStream recommends that you adjust the Windows System Display text setting to 100% and do not apply any Custom Scaling options.

Package Contents and Naming Conventions

The package file name contains multiple identifiers that correspond with the platform. Renaming any of the elements contained in a package is discouraged in order to preserve the integrity of the naming conventions.

Example: GEN_PV9.0.0_GV200_PackageContents.zip

Identifier	Description
GEN	Solution ID
PV9.0.0	Minimum platform version required. OneStream recommends upgrading to the latest platform version.
GV2.0.0	Genesis version
PackageContents	File name

OneStream Solution Modification Considerations

Review these cautions and considerations regarding the modification of OneStream Solutions:

- If changes are made to any dashboard object or Workspace Assembly, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the OneStream Solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and dashboards.
- If modifications are made to a OneStream Solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes, such as changing a logo or colors on a dashboard, do not impact upgrades significantly.