



Journal Analytics Embedded Content Block Guide

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Overview

As part of Financial Close, the Journal Analytics Embedded Content Block provides an integrated view into Journal Entry Manager, enabling you to complete the following activities:

- Monitor journal activity
- Analyze status distribution
- Drill into journal details in a single unified analytics experience

This Content Block provides configurable visualizations of journal data. In Genesis Designer, designers and administrators control which data is displayed in Genesis Navigation for end users.

This guide provides the dependencies and prerequisites and outlines how to set up and configure the Content Block in Genesis Designer as well as how to view the content in Genesis Navigation.

Dependencies

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 2.0.0 is required.
- Minimum Financial Close PV9.0.0 SV3.0.0 is required.

Prerequisites

Review these security requirements:

- To install Genesis or import Content Blocks, you must meet one of the following requirements:
 - You must be a member of the system security group Administrator.
 - You must be a member of the group assigned to the application security role `AdministerApplication` and the group assigned to the application user interface role `ApplicationLoadExtractPage`.
- To inject Content Blocks, you must be a member of the group assigned to the application security role `ManageApplicationWorkspaces`.
- To have the option to enable the Admin view on the Content tab in Genesis Designer and Genesis Navigation, you must be in the Solution Administration Group, which is set on the Global Options section of the Settings page in Journal Entry Manager.

Set Up the Content Block

Follow these steps to set up the Content Block:

1. [Install Genesis](#).
2. [Enable Library Service or Import the Content Block](#).

Install Genesis

These are installation instructions to set up Genesis in an application that does not have it installed.

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 Desktop.
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.

Set Up the Content Block

8. Select **Open**.
9. Select **OK** to complete the installation.
10. After Genesis loads, the following dashboard profiles will display in **Dashboards**:
 - **Genesis Designer**: On this page, you can configure Content Blocks.
 - **Genesis Navigation**: On this page, you can view the content that was configured in Genesis Designer.

Enable Library Service or Import the Content Block

From Genesis Designer, you can automatically connect to a live exchange store that gives you access to an up-to-date library of Content Blocks. This Library Service is available for cloud environments. Enable Library Service to use this live exchange store. You do not need to download and import the Content Blocks. To enable Library Service, follow these instructions:

1. Log in to OneStream.
2. Go to **Dashboards > Genesis Designer > Genesis Designer > Settings > Library Management**.
3. Select the **SETTINGS** tab.
4. Under **Enable the Library Service**, select the **Yes** radio button.

For on-premises environments and for instances that have the Library Service turned off, follow these instructions to download and import Content Blocks from OneStream Solution Exchange.

Set Up the Content Block

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 and select the **VIEW MORE** button.
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.
6. Log in to OneStream.
7. Go to **Dashboards > Genesis Designer > Genesis Designer > Settings > Library Management**.
8. Select the **IMPORT** tab.
9. 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.
10. Select the **Import** button.
11. Select the Content Block package.
12. Select the **Open** button.

Configure the Content Block in Genesis Designer

The Journal Analytics Embedded Content Block supports widget configuration and role-based perspectives to customize the experience to different users.

This Content Block provides read-only analytics configured in Journal Entry Manager. To configure data in Journal Entry Manager, see the *Financial Close Guide*.

Follow these instructions to inject the Content Block into a Page in Navigation. The Content Block must be injected into a Page for it to be visible in Genesis Navigation for end users.

NOTE: Alternatively, you can inject the Content Block in Content Management using the Inject Content Block icon, then add it to a Page in Navigation using the Link an Existing Content Item from a Shared Workspace icon. See the *Genesis Guide*.

1. Go to **Dashboards > Genesis Designer > Genesis Designer > Designer Home > Navigation**.
2. Select the **New Navigation Group** icon.



3. In the **Property Editor** slide-out panel, complete the following fields:

Configure the Content Block in Genesis Designer


- **Navigation Group:** Enter a new name, which will be used as an internal identifier for the Navigation Group.
- **Description:** Enter a description, which will display as the name in the navigation bar.

4. Select the **Save** button.
5. In the navigation tree, select the Navigation Group.
6. Click the **New Page** icon.



7. In the **Property Editor** slide-out panel, complete the following fields:
 - **Page:** Enter a new name, which will be used as an internal identifier for the Page.
 - **Description:** Enter a description, which will display as the name in the page bar.
8. Select the **Save** button.
9. In the navigation tree, select the Page.
10. Select the **Inject a New Basic Library Content Item** icon.



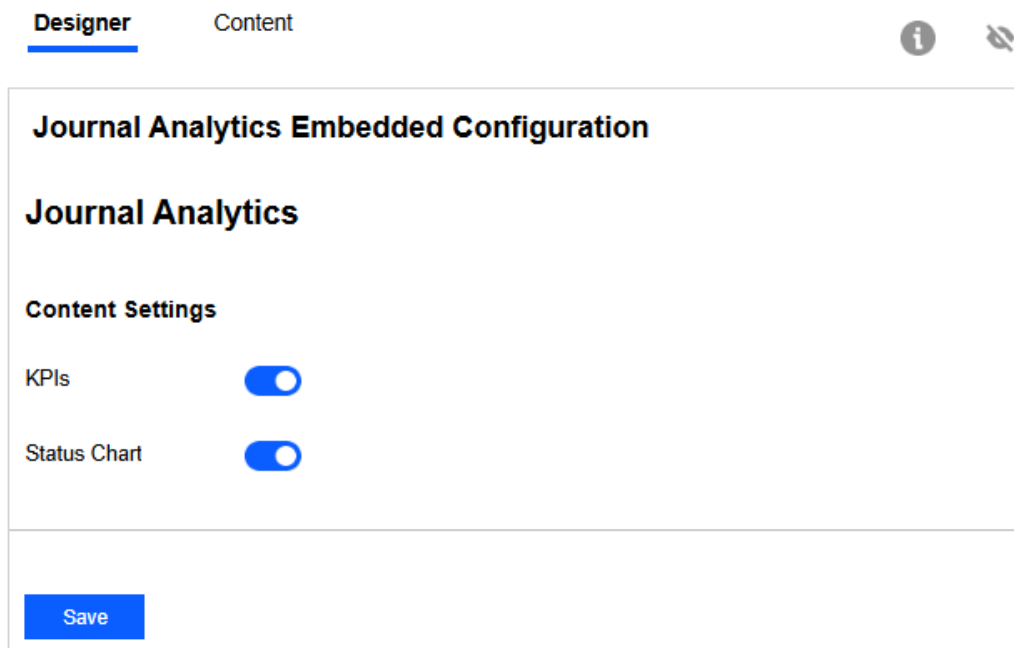
11. In the **Content Library** slide-out panel, search for the **Journal Analytics Embedded** Content Block, and select the **Add this Content Package**  icon next to it.
12. In the navigation tree, select the Journal Analytics Embedded Content Block.

Configure the Content Block in Genesis Designer

- On the Designer tab, you can configure the Content Block. See [Designer Tab](#).
- On the Content tab, you can preview the content that end users will view. See [Content Tab](#).

Designer Tab

1. Select the **Designer** tab.



2. Choose the widgets to display in Genesis Navigation. Under **Content Settings**, you can select the following options:
 - **KPIs**: Displays key performance indicators (KPIs) as a grid of cards with the number of journals in each state. In Genesis Navigation, users can select each card to view detailed information.

Configure the Content Block in Genesis Designer

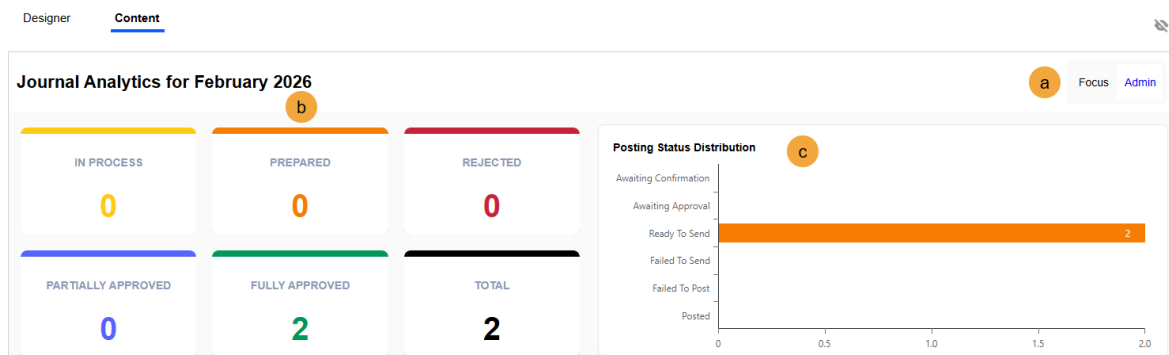
- **Status Chart:** Displays a bar chart with the number of journals based on due date. In Genesis Navigation, users can select the bars to view details.

NOTE: You can select both KPI cards and the status chart, but you must select at least one option.

3. Select the **Save** button

Content Tab

1. Select the **Content** tab to see how the content will display for end users on Genesis Navigation.



- a. **Focus Admin toggle:** To view this feature, you must be in the Solution Administration Group, which is set on the Global Options tab of the Settings page in Journal Entry Manager.
 - **Focus:** Displays journal statistics related to the current user. Users without Journal Entry Manager administrator privileges will always be in this mode.
 - **Admin:** Displays application-wide journal statistics based on the Administrator role. This is the default selection for Journal Entry Manager administrators.

Configure the Content Block in Genesis Designer

The selected mode is saved across sessions when you log out and log back in. Journal Entry Manager administrators can update the setting as needed.

- b. **State KPI card:** This feature displays if the KPIs option is selected on the Designer tab.

Select the numbers on these cards to open the Journal Entry Manager slide-out panel and view the journal grid, which has a filter set to display details about the journals in the selected state.

NOTE: If only the KPIs option is selected on the Designer tab, the cards will display in a single row.

- c. **Status Distribution bar chart:** This feature displays if Status Chart is selected on the Designer tab.

Select the bars to open the Journal Entry Manager slide-out panel, which has a filter set to display details about the journals with the selected posting status. Then select a journal to drill down further into the data.

- 2. Select the number in a state KPI card to view more details.

NOTE: This feature displays if the KPIs option is selected on the Designer tab.

Configure the Content Block in Genesis Designer

The screenshot shows the Journal Entry Manager interface. At the top, there is a navigation bar with 'Journals', 'Templates', and 'ERPs' highlighted by callout 'a'. To the right are 'Audit Log' (callout 'b'), 'Settings' (callout 'c'), and 'Help' (callout 'd'). Below the navigation bar are filters for 'Role' (All), 'Posting Period' (Current Period), and 'Posting State' (All), with callout 'e'. A row of KPI cards shows counts for 'In Process' (0), 'Prepared' (0), 'Partially Approved' (0), 'Fully Approved' (2), and 'Rejected' (0), with callout 'f'. Below the KPI cards are 'Create', 'Import', and 'Template' buttons (callout 'g'), and a 'Run Report' button. The main area contains a table with columns: OS ID, Journal Name, ERP, ERP ID, Template Name, Debit, Credit, Posting Period, and Effective Date. The table has two rows of data. At the bottom, there is a pagination control showing '1' and '1 - 2 of 2 rows'.

OS ID	Journal Name	ERP	ERP ID	Template Name	Debit	Credit	Posting Period	Effective Date
46	Sales Accrual Re...	PeopleSoft		Sales	933,859.08	933,859.08	2026M2	7/15/2026
35	All State	SAP		Prepays	4,166.67	4,166.67	2026M2	7/15/2026

- Journals, Templates, and ERPs pages:** Hover your cursor over these items in the top navigation to view the pages available in each category. Select a page to view more information.
- Audit Log:** Select to view the audit log. Filter using a start and end date, and select an entry to view more information.
- Settings pages:** Hover your cursor over this item in the top navigation to view the pages available for Journal Entry Manager settings, including the Global Options page. Select a page to view more information.
- Help page:** Select to access the Journal Entry Manager documentation.
- Filters:** Use filters to refine the list displayed.
- KPI cards:** The KPI cards indicate the number of journals in each selected state. Select a number to view the journals. Select the number again to return to the full list.
- Journal grid:** View information related to journals on this primary page.

View Content in Genesis Navigation

To view the content on a Page that has the Journal Analytics Embedded Content Block injected, follow these instructions:

1. Go to **Dashboards > Genesis Navigation > Genesis Navigation**.
2. On the left panel, from the drop-down menu, select the Application Group. The associated Navigation Groups will be listed in the navigation bar below.
3. Select the Navigation Group.
4. If multiple Pages are listed, select the Page to view the associated content.
5. Select the options to view the full scope of content. For details about the available options for this Content Block, see [Content Tab](#).

Release PV9.0.0 GV2.0.0 BV1.0.0

This is the initial release of the Journal Analytics Embedded Content Block.

Compatibility

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 2.0.0 is required.
- Minimum Financial Close PV9.0.0 SV3.0.0 is required.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)