



My Datasets

Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

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Overview

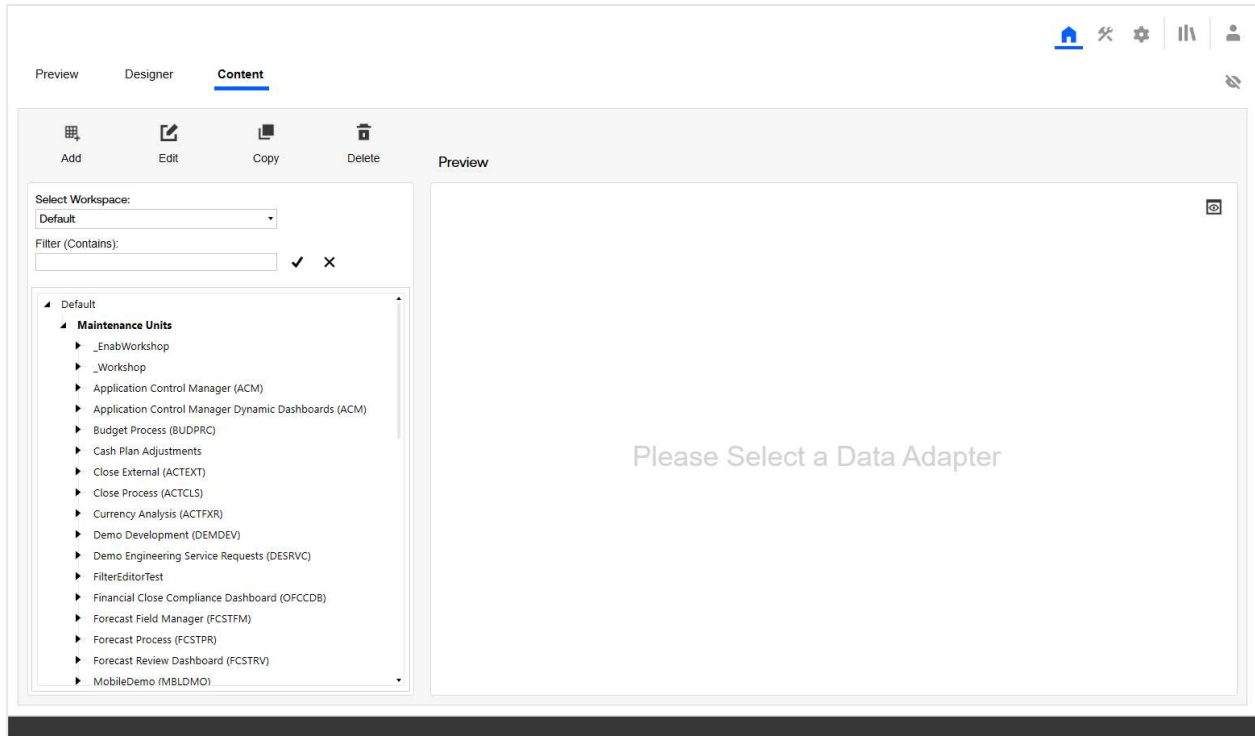
The My Datasets block enables the user to manage all aspects of a data adapter inside the Genesis Workspace and the existing My Datasets Maintenance Unit. It allows you to view, edit, copy, delete, or preview data adapters.

Use Cases


- Creation of new Data Adapters
- Editing of Existing Data Adapters
- Deletion of Existing Data Adapters
- Copying of Existing Data Adapters
- Previewing of Existing Data Adapters

Designer

The Designer Page allows full administration of the data adapters inside the existing Genesis Workspace and existing My Datasets Maintenance Unit.



Add

Within the Content Page, the user can select the add button  and this will generate a page to “Create a New Adapter”. Adding a new adapter will only be available for the existing Workspace and existing Maintenance Unit.

Create New Adapter

General Settings

Input New Data Adapter Name:

Select Command Type:

Select Target Workspace:

Select Target Maintenance Unit:

The Create New Adapter provides four settings out of the box.

Input New Data Adapter Name

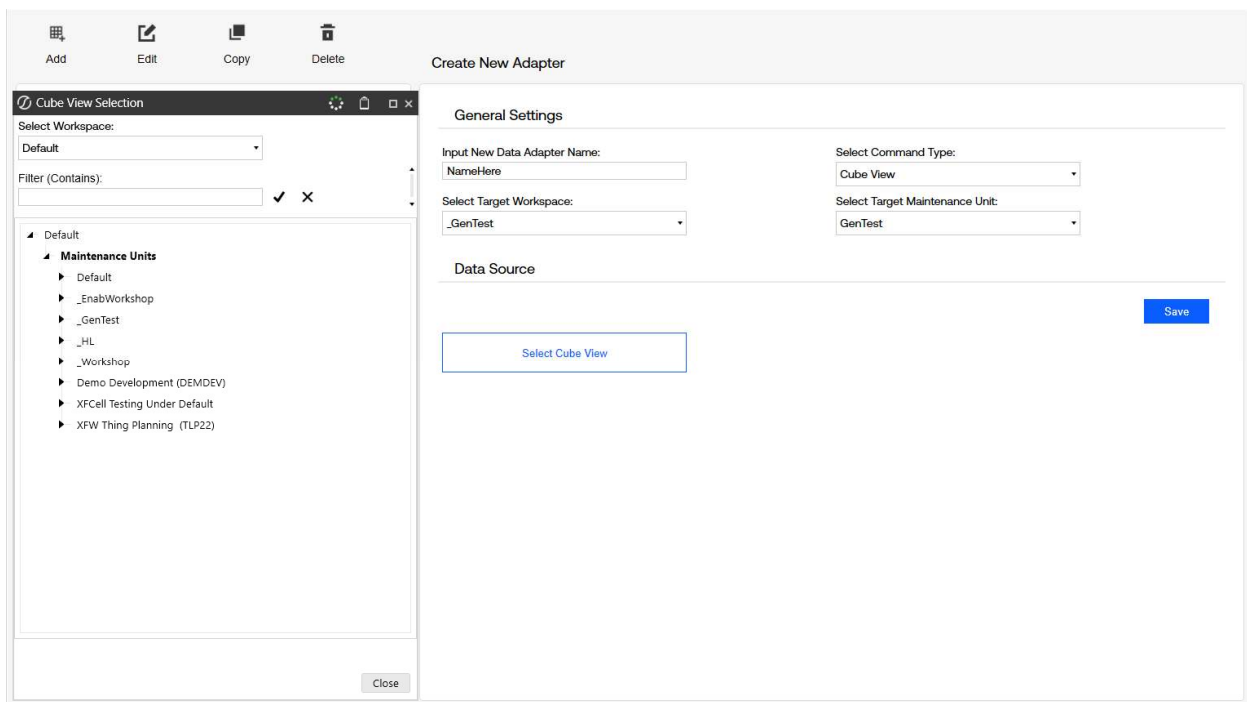
This form provides a free text input field for users to enter the name of a new data adapter.

Select Command Type

This dropdown menu allows users to select the type of data adapter to be used. The available options are identical to those for a standard adapter: Cube View, Cube View MD, Method, SQL, or BI-Blend.

Cube View

When the Cube View command type is selected, a 'Select Cube View' box will appear. Clicking this box opens a prompt that allows users to navigate through the Workspaces and select Cube View by group.



Cube View MD

The Cube View MD command type will display a 'Select Cube View' style box, similar to the Cube View command. However, it provides functionality nearly identical to a standard Cube View MD data adapter. The My Datasets Cube View MD selection does not allow adjustments to, or visibility of, the 'Add Start End Calendar Time' or 'Loop Parameters' options. If needed,

these settings can be modified by creating a copy of the data adapter and making the necessary changes on the data adapter component page.

General Settings

Input New Data Adapter Name:
NameHere

Select Target Workspace:
_GenTest

Select Command Type:
Cube View MD

Select Target Maintenance Unit:
GenTest

Data Source

Source Type:
Existing Cube View

Select Cube View

Entity:	Consolidation:
Name And Description	Name And Description
Scenario:	Time:
Name And Description	Name And Description
View:	Account:
Name And Description	Name And Description
Flow:	Origin:
Name And Description	Name And Description
IC:	UD1:
Name And Description	Name And Description
UD2:	UD3:
Name And Description	Name And Description
UD4:	UD5:
Name And Description	Name And Description
UD6:	UD7:
Name And Description	Name And Description
UD8:	DimensionLevel:
Name And Description	

Method

Selecting the Method command type allows users to choose a method query. The selected Method Query functions identically to a standard data adapter method query. If the Input Method Query box is left blank, an error message will notify the user of the required syntax for the chosen Method Query.

General Settings

Input New Data Adapter Name:
NameHere

Select Target Workspace:
_GenTest

Select Command Type:
Method

Select Target Maintenance Unit:
GenTest

Data Source

Select Method Type:
Business Rule

Input Method Query:
{MyBusinessRuleName}{MyDataSetName}
{Name1=Value1, Name2={Value2}}

SQL

Selecting the SQL command type functions the same as a standard data adapter. Users must choose from the Application, Framework, or External database options. The SQL Query Builder is a new feature designed to assist novice SQL users in generating SQL queries without requiring expertise in the SQL language. Users can select the Database and Table and then choose the columns to include in the Select Statement. If needed, they can also add Where, Group, Having, or Order Clauses.

General Settings

Input New Data Adapter Name: <input type="text" value="NameHere"/>	Select Command Type: <input type="text" value="SQL"/>
Select Target Workspace: <input type="text" value="._GenTest"/>	Select Target Maintenance Unit: <input type="text" value="GenTest"/>

Data Source

Select Database Location: <input type="text" value="Application"/>	<input type="button" value="Save"/>
<input type="button" value="Open SQL Query Builder"/>	
Input SQL Query: <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	

SQL Query Builder

SQL Builder (SQLQueryManager)

Select Database:
Application

Select Table:
[Dropdown]

Distinct Values:

Available Columns:
(None)

Select Columns:
[Text Box]

Where (Filter Expressions):
[Text Box]

Group Columns:
[Text Box]

Having (Filter Expressions):
[Text Box]

Order By Columns:
[Text Box]

Save Cancel

However, the Input SQL Query remains a free-form text box, allowing users to type or paste SQL queries directly into it. This flexibility supports the creation and use of complex SQL queries.

BI-Blend

Selecting the BI-Blend command type will display a 'Select Table Info' box. However, if BI-Blend is not enabled or no data is found, clicking the box will not trigger any action.

Create New Adapter

General Settings

Input New DataAdapter Name:

Select Command Type:

Select Target Workspace:

Select Target Maintenance Unit:

Data Source

When Bi-Blend is properly configured and data is present in a Bi-Blend table, the box will enable the selection of a table. Additionally, the Group By, Data Field Aggregation Types, and Where Clause boxes will become available.

General Settings

Input New Data Adapter Name:

Select Command Type:

Select Target Workspace:

Select Target Maintenance Unit:

Data Source

Group By:

Data Field Aggregation Types:

Where Clause:

Select Target Workspace

This dropdown is disabled. The target Workspace is unable to be changed and will default to the existing Genesis workspace.

Select Target Maintenance Unit

This dropdown is disabled. The target Maintenance Unit is unable to be changed and will default to the existing Genesis Maintenance Unit.

Edit



Edit

To use the Edit button, a Data Adapter must first be selected from the tree. Clicking the Edit button will display the existing configuration of the selected data adapter, allowing the user to modify it. Clicking Save will apply and store the changes to the data adapter.

The screenshot shows the 'Edit Adapter' configuration window. The left pane displays a tree view with the following structure:

- OneStream Financial Close
 - Maintenance Units
 - Reconciliation Manager
 - Data Adapters
 - cht_AgingCountPastDue_RCM
 - cht_AgingCountPastDuebyEntity_RCM
 - cht_AgingUnexplainedBalance_RCM
 - cht_ReconCountApprovalStatus_RCM
 - cht_ReconCountDuelnStatus_RCM
 - cht_ReconCountEntityPivotStatus_RCM
 - cht_ReconCountPreparationStatus_RCM
 - da_ReconDrillFromAccountEntityGolfStream_GS2
 - grd_Arrvntllt_RCM**
 - grd_AllMatchSets_RCM
 - grd_AssignedMatchSets_RCM
 - grd_AuditAccountGroupsLog_RCM
 - grd_AuditSecurityRolesLog_RCM
 - grd_AuditTimeAttributesLog_RCM
 - grd_AvailableMatchSets_RCM
 - grd_AvailableMatchSets_RCM_Copy
 - grd_GroupChildBalances_RCM
 - grd_GroupForAttributeUpdate_RCM
 - grd_PriorReconComments_RCM
 - grd_PriorReconItems_RCM
 - grd_ReconAttributes_RCMD
 - grd_ReconDocHistory_RCM
 - grd_ReconFairAttributeUpdate_RCM
 - grd_ReconGroupChildren_RCM
 - grd_ReconGroupInventory_RCM
 - grd_ReconInventory_RCM
 - grd_ReconSdocItems_RCM
 - grd_ReconStatDetails_RCM
 - grd_ReconStatLog_RCM

The right pane, titled 'Edit Adapter', contains the following configuration fields:

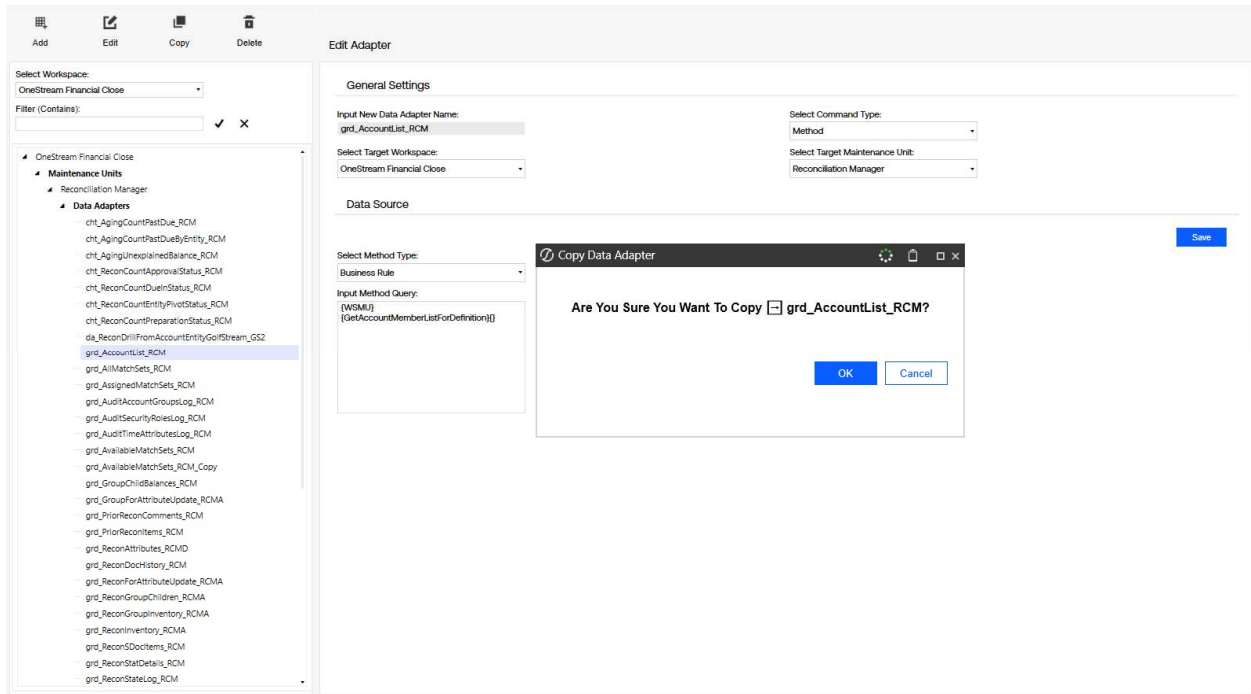
- General Settings**
 - Input New Data Adapter Name:
 - Select Target Workspace:
 - Select Command Type:
 - Select Target Maintenance Unit:
- Data Source**
 - Select Method Type:
 - Input Method Query:
-

Copy




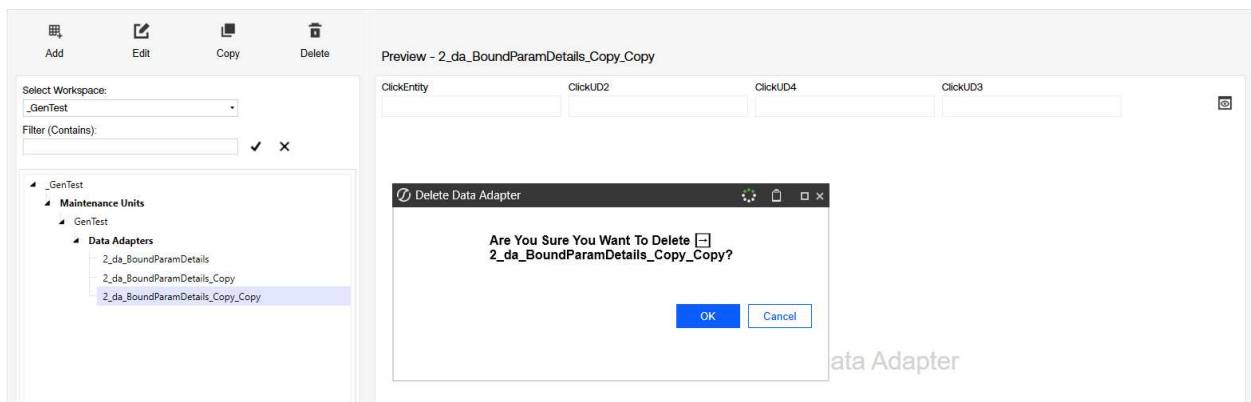
Copy

After selecting a specific data adapter in the tree, clicking the Copy button enables the Administrator to duplicate the existing data adapter in the same location. The duplicated adapter will have 'Copy' appended to the end of its original name.

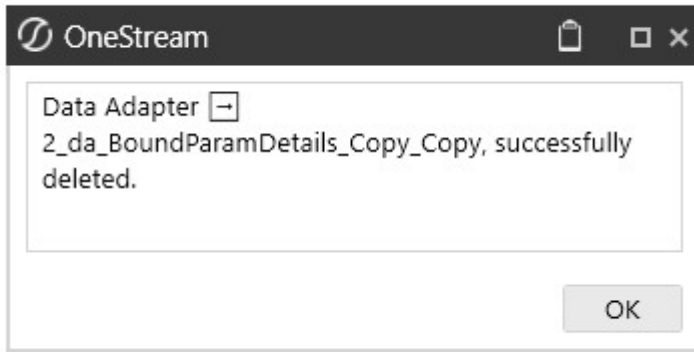


Delete

The Delete button  prompts the user to confirm whether they want to delete the selected data adapter. Once deleted, the data adapter cannot be recovered and will be permanently lost.



Once you click OK and confirm the deletion you will receive a message box confirming the deletion as well.



Preview



The Preview button allows the user to see up to the top 20 records of any selected data adapter.

Preview - 2_da_BoundParamDetails_Copy

ClickEntity ClickUD2 ClickUD4 ClickUD3

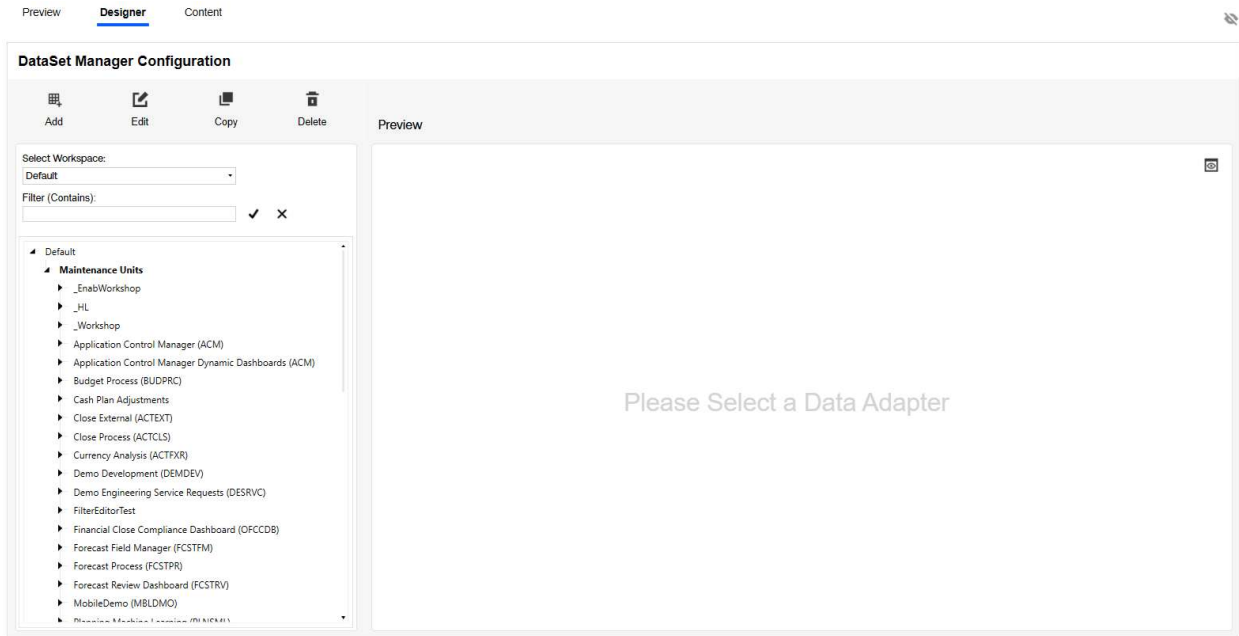
Drag a column header and drop it here to group by that column

	Cube	Entity	Parent	Cons	Scenario	Time	StartDate	EndDate
▾	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M1 - Jan 2024	1/1/2024 12:00:00 AM	1/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M1 - Jan 2024	1/1/2024 12:00:00 AM	1/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M2 - Feb 2024	2/1/2024 12:00:00 AM	2/29/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M2 - Feb 2024	2/1/2024 12:00:00 AM	2/29/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M3 - Mar 2024	3/1/2024 12:00:00 AM	3/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M3 - Mar 2024	3/1/2024 12:00:00 AM	3/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M4 - Apr 2024	4/1/2024 12:00:00 AM	4/30/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M4 - Apr 2024	4/1/2024 12:00:00 AM	4/30/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M5 - May 2024	5/1/2024 12:00:00 AM	5/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M5 - May 2024	5/1/2024 12:00:00 AM	5/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M6 - Jun 2024	6/1/2024 12:00:00 AM	6/30/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M6 - Jun 2024	6/1/2024 12:00:00 AM	6/30/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M7 - Jul 2024	7/1/2024 12:00:00 AM	7/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M7 - Jul 2024	7/1/2024 12:00:00 AM	7/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M8 - Aug 2024	8/1/2024 12:00:00 AM	8/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M8 - Aug 2024	8/1/2024 12:00:00 AM	8/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M9 - Sep 2024	9/1/2024 12:00:00 AM	9/30/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M9 - Sep 2024	9/1/2024 12:00:00 AM	9/30/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M10 - Oct 2024	10/1/2024 12:00:00 AM	10/31/2024 12:00:00 AM
	Equipment Division	GSE - GolfStream Equipment		USD - United States of America, Dollars	Forecast6p6 - Forecast 6p6	2024M10 - Oct 2024	10/1/2024 12:00:00 AM	10/31/2024 12:00:00 AM

This is a great test to validate that the data adapter is rendering data as expected.

Content Page

The Content Page functions identically to the content page, allowing data adapters to be created on either page.



Release Notes

Version 2.0.0

This major release introduces block upgradeability further strengthening content development and management. This capability is foundational to how Genesis content will evolve going forward.

Important Notes

Upgradeability is only available for blocks running version 2.0.0 or later. Existing blocks on version 1.x must be migrated to 2.0.0 first. This is a one-time process. See *Content Block Upgrade Path* below for migration details.

Enhancements

Block Upgradeability

This block has been updated to fully support the new upgradeability framework introduced in Genesis 2.0.0. This ensures that the block can evolve over time without requiring pages to be rebuilt or configurations to be recreated.

The following capabilities are now available for all blocks at version 2.0.0 and above:

- Version Awareness**
Blocks now report their version and indicate when a newer version is available. Administrators can see at a glance which pages are running older versions.
- Compatibility Validation**
Each block now includes version-to-version compatibility rules. During an upgrade, Genesis automatically checks whether content and configuration can be safely migrated.
- Selective Upgrades**
Identify and select specific blocks to upgrade on specific pages.
- Configuration and Content Preservation**
Upgrades carry forward existing filter settings, parameters, and layout configuration. Pages do not need to be rebuilt.

Important Note: This feature is not retroactive. Blocks on version 1.x do not include the upgradeability framework. They must be migrated to 2.0.0 first. See *Content Block Upgrade Path* below for migration details.

Platform and Genesis Compatibility

Genesis Version Requirement

Blocks at version 2.0.0 are only compatible with Genesis 2.0 or later.

Do not inject a 2.0.0 block into a Genesis 1.x Instance. The block will not function, and the upgradeability features will not be available.

Minimum Platform Version	9.0.0
Minimum Genesis Version	2.0.0

Content Block Upgrade Path

One-time Migration: Moving an Existing Block to Version 2.0

This process applies only to blocks currently on version 1.x. Follow these steps once to bring your existing block up to version 2.0.

After completing this migration, future upgrades can be performed directly within Genesis and will not require content re-building.

1. Create a new page and set its visibility to Hidden.
2. Inject and configure the 2.0.0 version of the block on this page.
3. Verify functionality to ensure the block behaves as expected.
4. Hide the original page and make the new page visible.
5. After end-user confirmation, delete the original block and page.

Why is this still required for 2.0?

Block upgradeability is functionality built into the 2.0.0 block itself. Blocks on version 1.x do not include this functionality and therefore cannot be upgraded in place. The steps above are the final time you will need to follow this process for this block.

Upgrading from 2.0.0 to Future Versions

Once a block is running version 2.0.0 or later, upgrades are handled directly within Genesis. No page rebuilding or reconfiguration is required.

Refer to the [Genesis Guide](#) for more details on the block upgrade process.

Version 1.1.0

The theme of this minor release is enhancements to existing functionality.

Enhancements

- **Unified Table and View Selection in SQL Builder**
When creating a SQL-based data adapter, the Select Table list in the SQL Builder now displays both tables and views, offering greater flexibility in data source selection. To promote best practices, BinaryData and DataRecord tables have been excluded from the list.
By including views, report designers can now leverage derived or pre-aggregated data, enabling more efficient and maintainable reporting solutions while avoiding direct queries on binary or transactional tables.
- **Start End Calendar Time Configuration added for Cube View MD**
When creating a Cube View MD based data adapter, you can now configure the “Add Start End Calendar Time” setting This enhancement enables more precise control over how the BI Viewer interprets and renders data based on calendar time boundaries.

Fixed Issues

- **External Database Connections Not Displayed**
When selecting External as the database location in the SQL data adapter configuration, the Select External Database Connection dropdown appeared empty, even though external connections were properly configured. The dropdown now correctly displays all available external database connections.
- **Removal of "Framework" Option in Database Location Dropdown**
In the SQL data adapter configuration within the Dataset Manager block, the Select Database Location dropdown previously included a Framework option. The Framework option has been removed to align with best practices that direct querying of the Framework database is not recommended.

Version 1.0.0

This is the initial release of this block.

Platform and Genesis Compatibility

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