



# Genesis Guide

PV9.0.0 GV100

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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](#).

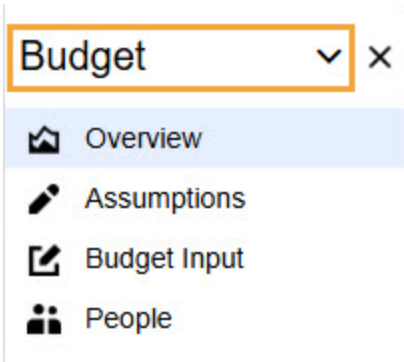
# Genesis Navigation

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

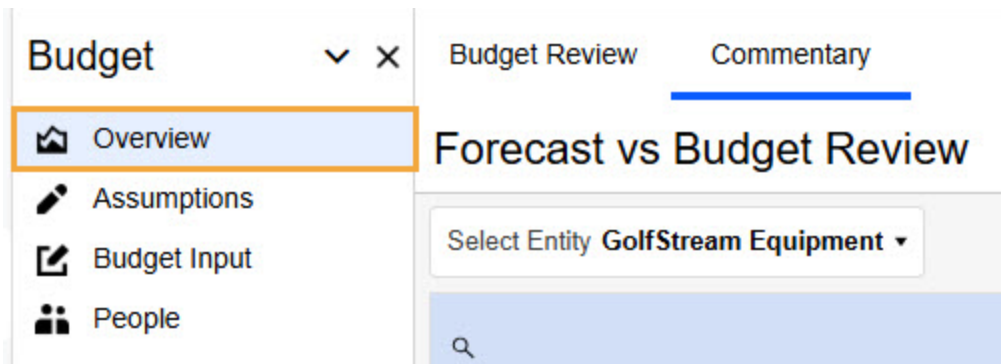
The default Application Group that displays is Home. Default Navigation Groups and Pages are set in Genesis Designer. See [Reorder List](#).

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

1. On the left pane, 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.

The screenshot shows the 'Budget Review' interface with the 'Commentary' tab selected. The main table is titled 'Forecast vs Budget Review' and displays financial data for 'GolfStream Equipment' for the years 2025 and 2026. The table includes columns for 'Forecast 6&6', 'Budget Working', 'Variance', and 'Variance %'. The data is categorized into 'Revenues' and 'Compensation'.

	2025	2026			
	Forecast 6&6	Budget Working	Variance	Variance %	
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%	
<b>Revenues</b>	<b>778,855,017</b>	<b>778,998,678</b>	<b>143,660</b>	<b>0.02%</b>	
Cost of goods sold	106,482,062	114,474,764	(7,992,702)	-7.51%	
<b>Gross income</b>	<b>672,372,956</b>	<b>664,523,914</b>	<b>(7,849,042)</b>	<b>-1.17%</b>	
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%	
<b>Compensation</b>	<b>317,200,808</b>	<b>311,577,811</b>	<b>5,622,996</b>	<b>1.77%</b>	
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%	
<b>Total operating expenses</b>	<b>530,555,979</b>	<b>519,085,791</b>	<b>11,470,188</b>	<b>2.16%</b>	
Depreciation and amortization	50,177,447	45,373,071	4,804,377	9.57%	
<b>Total operating income</b>	<b>91,639,530</b>	<b>100,065,052</b>	<b>8,425,523</b>	<b>9.19%</b>	

The right side of the interface shows 'GolfStream Equipment Comments' and 'Aggregated comments for GolfStream Equipment'. Comments include: 'NA Equipment: Slight growth in o', 'Rocky Mtn Clubs: Sales expected', 'NA Equipment: Budget includes o', 'Maple Leaf Clubs: Reduced taxes', 'NA Equipment: Company wide inv', and 'Rocky Mtn Clubs: Higher travel cc'.

**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.

## 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.

# 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.

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



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

There are security requirements for Genesis Designer. See [Genesis Designer](#), [Image Library](#), 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 in the upper left 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**  button. See [Navigation](#).
- To manage Content Blocks, click the **Content Management**  button. See [Content Management](#).
- To apply a color theme to the Genesis instance, click the **Colors**  button. See [Colors](#).
- To customize the display of the navigation bar and page bar in the Genesis instance, click the **Styles**  button. See [Styles](#).

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

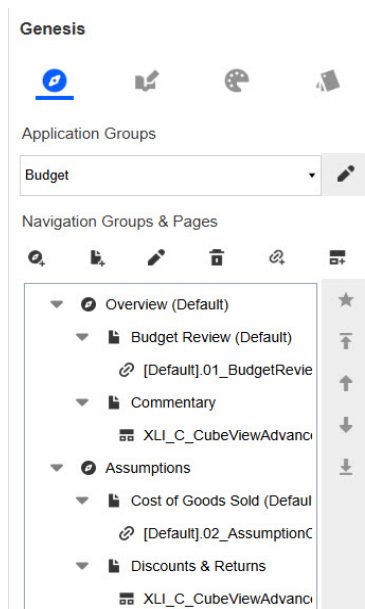
# Navigation

The Navigation page displays a hierarchical view of how content is organized in Navigation Groups and Pages. From this page, you can create Genesis objects or modify existing content.

There are security requirements for the Navigation page. See [Genesis Designer](#) and [Navigation](#).

The page includes the following panes:

- On the left pane, you can manage Application Groups, Navigation Groups, and Pages and add and configure content.



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

- On the right pane, you can select the Preview, Designer, and Content tabs to view the content.

- **Preview tab:** Displays a preview of the Genesis end-user view

Preview

Designer

Content

Budget

Budget Review

Commentary

Overview

Assumptions

Budget Input

People

Forecast vs Budget Review

Save

Select Entity GolfStream Equipment

	2025	2026			
	Forecast 6&6	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%	
<b>Revenues</b>	<b>778,855,017</b>	<b>778,998,678</b>	<b>143,660</b>	<b>0.02%</b>	
Cost of goods sold	106,482,062	114,474,764	(7,992,702)	-7.51%	
<b>Gross income</b>	<b>672,372,956</b>	<b>664,523,914</b>	<b>(7,849,042)</b>	<b>-1.17%</b>	
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%	
<b>Compensation</b>	<b>317,200,808</b>	<b>311,577,811</b>	<b>5,622,996</b>	<b>1.77%</b>	
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%	
<b>Total operating expenses</b>	<b>530,555,979</b>	<b>519,085,791</b>	<b>11,470,188</b>	<b>2.16%</b>	
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<b>Total operating income</b>	<b>91,639,530</b>	<b>100,065,052</b>	<b>8,425,523</b>	<b>9.19%</b>	

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

- **Designer tab:** If a Content Block is injected in the Page, this tab displays the configuration options for a selected Content Block.



Preview

**Designer**

Content

**Cube View Advanced Configuration**

Cube View

Filters

Buttons

**Cube View Settings**

Select Cube View

BudgetPnLComments\_BUDRVW

Description

Forecast vs Budget Review

Default Header

Hidden

**Content Block Detail**

Content Information

**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

Creator Information

**Company:**

OneStream

**Created By:**

**Created Date:**

20250430

**NOTE:** If an existing dashboard is linked to the Page, the Designer tab has no content.

For instructions to configure a Content Block, see the *Content Block Guide* in the Content Library on the Details page. You can also view and download the guide in OneStream Solution Exchange.

- **Content tab:** Displays the selected content

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Genesis Guide

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Preview Designer **Content**

Forecast vs Budget Review Save

Select Entity **GolfStream Equipment**

	2025	2026				
	Forecast 6&6	Budget Working	Variance	Variance %	GolfStream Equipment Comments:	Aggreg
Wholesale	441,315,855	440,031,361	(1,284,494)	-0.29%		
eCommerce	204,544,842	205,527,962	983,120	0.48%		NA Equi
Direct	112,196,751	111,926,848	(269,903)	-0.24%		
Component	71,608,944	72,040,755	431,811	0.60%		Rocky M
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%		
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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%		NA Equi
Payroll taxes	31,388,330	29,738,821	1,649,509	5.26%		Maple L
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## 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** button to the right of the drop-down menu.

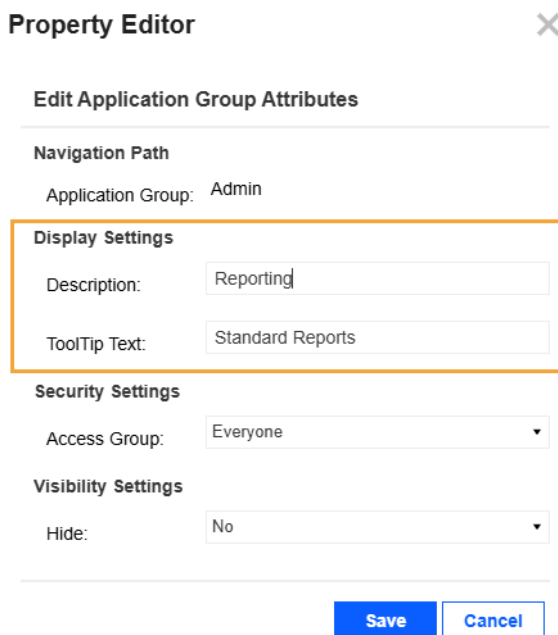
#### Application Groups

Admin

3. In the **Property Editor** dialog box, 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.



The screenshot shows the 'Property Editor' dialog box with a close button (X) in the top right corner. The title bar reads 'Property Editor'. Below the title bar is a section 'Edit Application Group Attributes'. Under this, there is a 'Navigation Path' section with 'Application Group: Admin'. The 'Display Settings' section is highlighted with an orange border and contains two text input fields: 'Description:' with the value 'Reporting' and 'ToolTip Text:' with the value 'Standard Reports'. Below this is the 'Security Settings' section with 'Access Group:' set to 'Everyone' in a dropdown menu. The 'Visibility Settings' section has 'Hide:' set to 'No' in a dropdown menu. At the bottom right are 'Save' and 'Cancel' buttons.

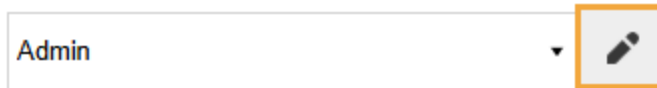
4. Click the **Save** button.

### 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** button to the right of the drop-down menu.

Application Groups



3. In the **Property Editor** dialog box, 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**

- Click the **Save** button.

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

### Navigation Groups & Pages

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).

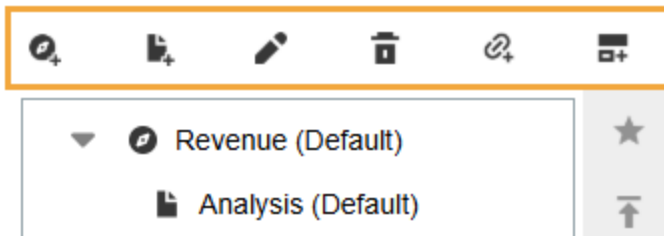
Pages display the content. Pages have a one-to-one relationship with content. Content can be linked to a Page from existing dashboards or injected using Content Blocks.

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

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, and associated content as third-level child items.

Use the toolbar on top of the navigation pane to create, edit, delete, link, and add items.

### Navigation Groups & Pages



### Create a Navigation Group

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



2. In the **Property Editor** dialog box, name the Navigation Group.

**NOTE:** The name must be unique; it cannot be used for another Navigation Group in the same Application Group. The name cannot include OneStream reserved words. See [Reserved Words](#). Also, spaces will be 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 [NavBar Settings](#).

**Property Editor** ✕

**New Navigation Group Definition**

Application Group: Admin

Navigation Group:

**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** button.



3. In the **Property Editor** dialog box, name the Page.

**NOTE:** The name must be unique; it cannot be used for another Page in the same Navigation Group. The name cannot include OneStream reserved words. See [Reserved Words](#). Also, spaces will be 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 [PageBar Settings](#).

**Property Editor** ✕

**New Page Definition**

Application Group: Admin

Navigation Group: Revenue

Page:

**Save** **Cancel**

4. Click the **Save** button.

### Edit a Navigation Group or Page

To edit a Navigation Group or Page, follow these steps.

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

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



3. In the **Property Editor** dialog box, 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 button height or navigation bar width to make space for it in the end-user view. See [NavBar Settings](#).

- **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:**
  - **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. 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 button to configure actions performed when the Navigation Group or Page is selected.

**IMPORTANT:** In order for actions to perform, a user must select the Navigation Group or Page. Default Navigation Groups and Pages will open 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** dialog box, update the options and then click the **Close** button.

- **Set Workflow POV:** Select this checkbox to set the Workflow POV. Select the Workflow POV settings in the **Workflow Profile**, **Workflow Scenario**, and **Workflow Time** drop-down menus.
- **Set Cube POV:** Select this checkbox to set the Cube POV. Click the ellipsis button to open the **Member Filter Builder** dialog box. 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 will only be able to view these page types in the Windows Application.

**Action Manager** ×

**Button Actions**

☒ **Set Workflow POV**

Workflow Profile

Workflow Scenario

Workflow Time

[WFProfile]

[WFScenario]

[POVTime]

☐ **Set Cube POV**

Cube POV

...

**Navigation**

Page Type

Page Item

Workflow

(None)

Close

- Click the **Save** button.

**Property Editor** ✕

Edit Navigation Group Attributes

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: No

Font Size: 28

 Save Cancel

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

### Delete a Navigation Group, Page, or Content Item

To delete a Navigation Group, Page, or content item, select it in the navigation tree and then click the **Delete** button.



If a parent item has an associated child item, it cannot be deleted. All associated child items must be removed, then you can delete the parent item.

Default Navigation Groups and Pages cannot be deleted. Set another item as default, then you can delete the Navigation Group or Page. To update the default setting of a Navigation Group or Page, see [Reorder List](#).

**NOTE:** The Delete button does not delete a Content Block. It just removes the link to the Page. To delete the Content Block, go to the Content Management page. See [Delete a Content Block](#).

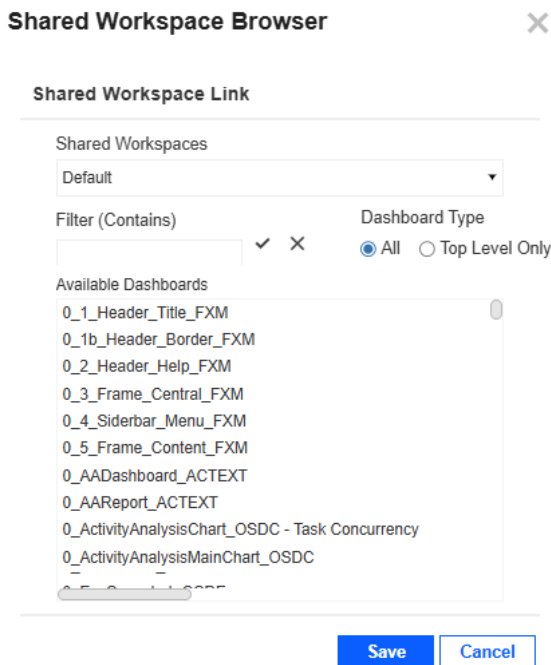
### Link Existing Content from a Dashboard

To link content to a Page from an existing dashboard, follow these steps:

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




3. In the **Shared Workspace Browser** dialog box, select the dashboard in the **Available Dashboards** list.



**TIP:** Use the **Shared Workspaces** drop-down menu, **Filter (Contains)** field, and **Dashboard Type** radio buttons to filter for the dashboard. Results will display in the **Available Dashboards** list.

4. 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**  button to turn off the preview. Then, in the navigation tree, select the content item (the linked dashboard), and click the **Delete** button to remove it.


### Add a New Content Block

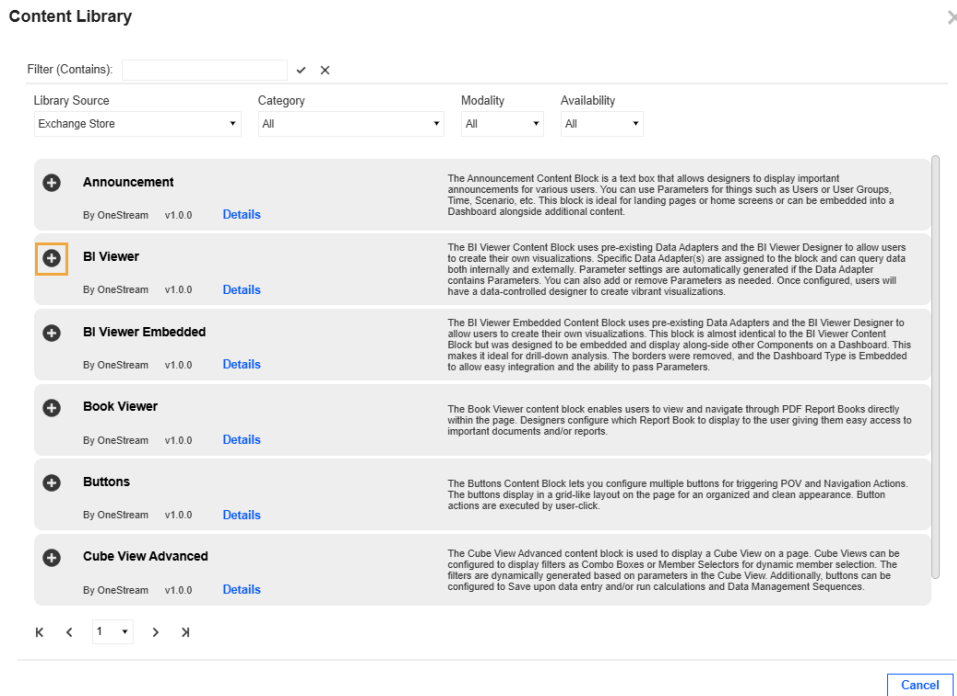
When you inject a Content Block, it is created as a new Maintenance Unit in the Genesis Workspace.


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** button.



3. In the **Content Library** dialog box, click the **Add this Content Package**  button next to the Content Block to add it.



Items that are not available have a lock  icon. Contact the appropriate sales representative for pricing of these items.

**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.

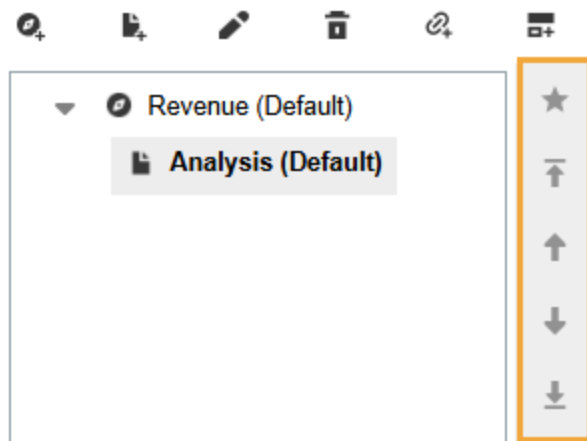
Content Blocks are configured on the Designer tab. For instructions, see the *Content Block Guide* in the Content Library on the Details page.

## 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** ★ button. 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** ↑ button.
- To move an item up in the navigation tree, select it and then click the **Move Up** ↑ button.
- To move an item down in the navigation tree, select it and then click the **Move Down** ↓ button.
- To move an item to display last in the navigation tree, select it and then click the **Move To Last** ↓ button.

## Content Management

On the Content Management page, you can view and configure Content Blocks that are injected into Pages. You can also inject a Content Block without assigning it to a Page.

## Genesis Designer

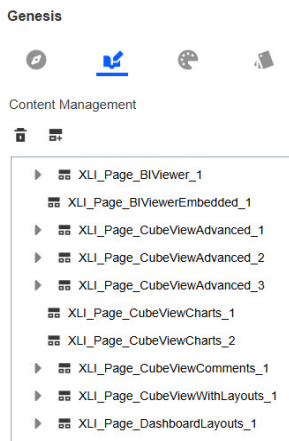
---

Later, you can link it to one or more pages.

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

The Content Management page includes the following panes:

- On the Content Management pane, you can manage Content Blocks. The navigation tree displays Content Blocks as the top-level items and associated Pages as second-level child items. This view is useful if you want to easily identify Content Blocks to update.



- On the right pane, you can select the Designer and Content tabs to view the content.

- **Designer tab:** Displays the configuration options for a selected Content Block

DesignerContent

Cube View Comments Configuration

Cube ViewFiltersButtonsCommentsLayouts

Cube View Settings

Select Cube View

\_cv\_ForecastOverview

Description

Default Header

Hidden

Save

Content Block Detail

Content Information

Name:

Cube View Comments

Description:

The Cube View Comments content block contains three content cards. Content cards 1 and 2 display a side-by-side view of a Cube View and an editable text box. The text box is used specifically for Cube View commentary such as Annotations or Variance Explanations. The commentary configuration provides options to enter comments and analyze them in a variety of ways such as a summary or aggregated view. The optional third content card allows you to add supplemental content such as charts or drill down analysis while performing all core interactions with the Cube View.

Category:

Data (Cubes)

Modality:

Universal

Creator Information

Company:

OneStream

Created By:

Created Date:

20250430

For instructions to configure a Content Block, see the *Content Block Guide* in the Content Library on the Details page. You can also view and download the guide in OneStream Solution Exchange.

- **Content tab:** Displays the selected content

Genesis Guide

30

Designer **Content**

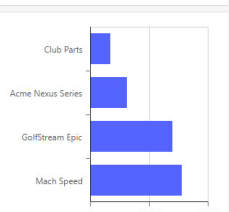
Select Entity: Rocky Mtn Clubs

Selected Cell: -EUS01

Comments Edit

	BudgetFinal	Forecast6p6	Forecast6p6	Forecast6p6	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%	
<b>Revenues</b>	<b>531,172,7...</b>	<b>1,048,233</b>	<b>532,220,9...</b>	<b>585,075</b>	<b>532,806,027</b>	<b>1,633,308</b>	<b>0.3%</b>	
Cost of goods sold	190,924,370	8,022,942	182,901,428	386,393	182,515,036	8,409,334	-4.4%	
<b>Gross income</b>	<b>340,248,3...</b>	<b>9,071,175</b>	<b>349,319,5...</b>	<b>971,468</b>	<b>350,290,991</b>	<b>10,042,6...</b>	<b>3.0%</b>	
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%	
<b>Compensation</b>	<b>169,579,0...</b>	<b>2,300,908</b>	<b>167,278,1...</b>	<b>-11,988,...</b>	<b>179,266,742</b>	<b>-9,687,6...</b>	<b>-5.7%</b>	
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%	
<b>Total operating expenses</b>	<b>260,114,4...</b>	<b>-1,083,1...</b>	<b>261,197,6...</b>	<b>-11,692,...</b>	<b>272,889,929</b>	<b>-12,775,...</b>	<b>-4.9%</b>	
Depreciation and amortization	28,525,600	-245,276	28,770,876	-26,769	28,797,645	-272,045	-1.0%	
<b>Total operating income</b>	<b>51,608,294</b>	<b>7,742,748</b>	<b>59,351,042</b>	<b>-10,747,...</b>	<b>48,603,417</b>	<b>-3,004,8...</b>	<b>-5.8%</b>	

Undo/Clipboard Font



Use the toolbar on top of the navigation pane to delete and inject Content Blocks.

## Content Management



### Delete a Content Block

To delete a Content Block, select it in the navigation tree and then click the **Delete** button.




If a Content Block is assigned to a Page, it cannot be deleted. Remove the Content Block from each Page, then delete it.

### Inject a Content Block

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

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




2. In the **Content Library** dialog box, click the **Add this Content Package**  button 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.

**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.

**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.

**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.

**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.

**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.

K < 1 > X

[Cancel](#)

Items that are not available have a lock  icon. Contact the appropriate sales representative for pricing of these items.

**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.

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](#).

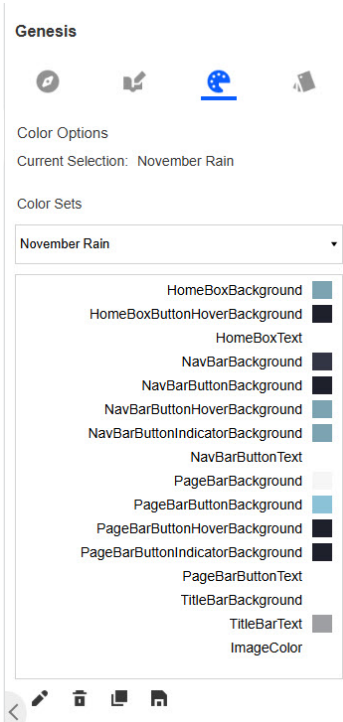
**TIP:** On the Content Management page, the navigation tree uses the following naming convention: XLI\_Page\_{ContentBlockname}\_{auto-increment}. On the Navigation page, the navigation tree uses the following naming convention: XLI\_C\_{ContentBlockname}\_{auto-increment}\_(Main). When linking an existing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

## Colors

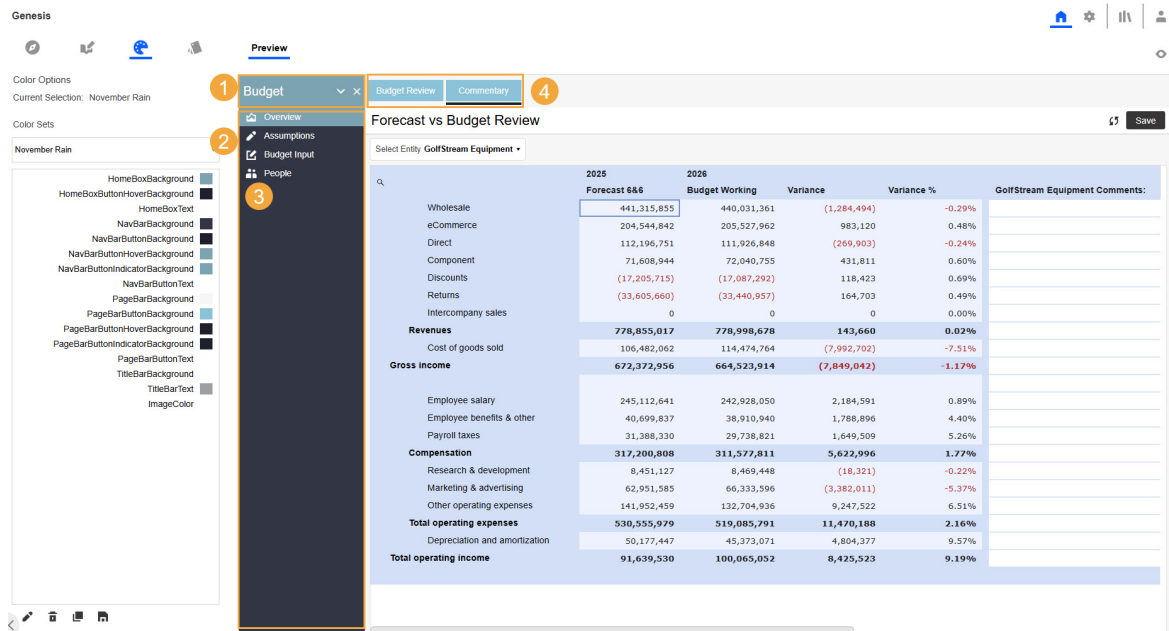
On the Colors page, you can customize the color theme of the home box, navigation bar, page bar, title bar, and images in the Genesis instance.

The Colors page includes the following panes:

- On the Color Options pane, you can view color sets and apply them.



- The Preview pane displays a preview of the end-user view with the saved color set applied.



1. Home box
2. Navigation bar
3. Image
4. Page bar

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

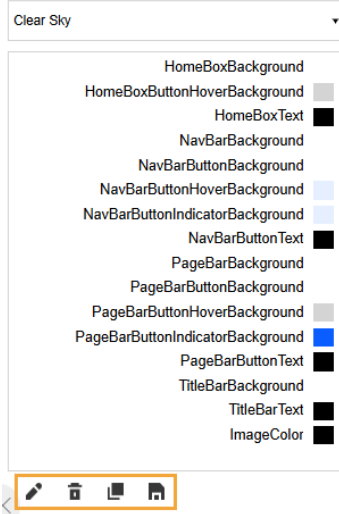
Use the toolbar at the bottom of the pane to edit, delete, copy, and apply a color set.



Color Options

Current Selection: Clear Sky

Color Sets



## Apply a Color Set

1. In the **Color Sets** drop-down menu, select an option. The details will display in the pane.

### 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 [NavBar Settings](#).

### 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 [PageBar Settings](#).

### 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

2. Click the **Apply Selected ColorSet to Application Foundation** button to apply the color set and view the updates in the Preview tab.



### Edit a Color Set




1. In the **Color Sets** drop-down menu, select an option.
2. Click the **Edit the Selected ColorSet** button. For details about each item in the color set, see [Apply a Color Set](#).



3. On the **ColorSet Editor** dialog box, in the field for each option, enter the 6-digit hex color code in the format #FF000000. To make an option transparent, type **Transparent**. To update **ImageColor**, in 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 <span>▼</span>

**Save** **Cancel**

4. Click the **Save** button.

### Delete a Color Set

When you delete a color set, it cannot be recovered unless it is backed up and imported in Instance Management. See [Instance Management](#).

To delete a color set, follow these steps:

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



### Copy a Color Set

To create a new color set, you can copy a color set and update it.

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



3. On the **ColorSet Editor** dialog box, enter a new name. The name must be unique; it cannot be used for another color set.

**ColorSet Editor** ×

**Copy ColorSet**

ColorSet Name:

Save Cancel

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

## Styles

On the Styles page, you can customize the display of the navigation bar and page bar in the Genesis instance.

The Styles page includes the following panes:

- On the left pane, you can view settings and apply them to the navigation bar and page bar.

Genesis

NavBar Settings

Application Group Display

☒ Menu ☐ Image

Width  Button Height

Selected State Type

☐ Indicator ☒ Highlight

Indicator Size

☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness

☐ Thin ☐ Standard ☒ Thick

PageBar Settings

Button Width

Indicator Size

☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness

☐ Thin ☐ Standard ☒ Thick

- The Preview pane displays a preview of the end-user view with the saved settings applied.

Genesis

Preview



Budget Review

Forecast vs Budget Review

	2025	2026			
	Forecast 6&6	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%	
<b>Revenues</b>	<b>778,855,017</b>	<b>778,998,678</b>	<b>143,660</b>	<b>0.02%</b>	
Cost of goods sold	106,482,062	114,474,764	(7,992,702)	-7.51%	
<b>Gross income</b>	<b>672,372,956</b>	<b>664,523,914</b>	<b>(7,849,042)</b>	<b>-1.17%</b>	
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%	
<b>Compensation</b>	<b>317,200,808</b>	<b>311,577,811</b>	<b>5,622,996</b>	<b>1.77%</b>	
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%	
<b>Total operating expenses</b>	<b>530,555,979</b>	<b>519,085,791</b>	<b>11,470,188</b>	<b>2.16%</b>	
Depreciation and amortization	50,177,447	45,373,071	4,804,377	9.57%	
<b>Total operating income</b>	<b>91,639,530</b>	<b>100,065,052</b>	<b>8,425,523</b>	<b>9.19%</b>	

1. Navigation bar

2. Page bar

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

1. In the left pane, select the style settings. See [NavBar Settings](#) and [PageBar Settings](#).
2. Click the **Apply Selected Layout Settings to Application Foundation** button to apply the style and view the updates in the Preview pane.

NavBar Settings

Application Group Display  
☒ Menu ☐ Image

Width:  Button Height:

Selected State Type  
☐ Indicator ☒ Highlight

Indicator Size  
☐ Tiny ☐ Small ☐ Medium ☒ Large


Indicator Thickness  
☐ Thin ☐ Standard ☒ Thick

PageBar Settings

Button Width:

Indicator Size  
☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness  
☐ Thin ☐ Standard ☒ Thick

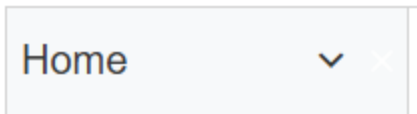


### NavBar Settings

#### Application Group Display

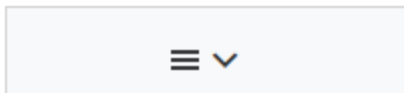
- **Menu:** Select to view the description for the selected item in the Application Groups drop-down menu.

### Preview



- **Image:** Select to view a menu image for the selected item in the Application Groups drop-down menu. Use this option to reduce size in the navigation bar.

### Preview



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

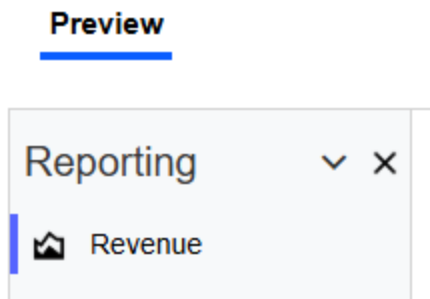
**Button Height:** Select the height of the space for each item in the navigation bar.

**TIP:** To make space for long names or a larger font size, you can increase the navigation bar width or button height.

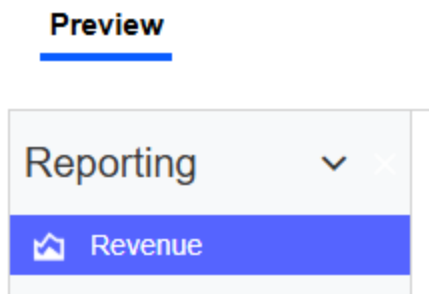
## Selected State Type

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





- **Highlight:** Select to highlight the 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 [Apply a Color Set](#).

**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**.

### PageBar Settings

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

**TIP:** To make space for long names, you can increase the button width.

**Indicator Size:** Select a length for the horizontal bar under the Page name: **Tiny**, **Small**, **Medium**, or **Large**.

**Indicator Thickness:** Select a thickness for the horizontal bar under the Page name: **Thin**, **Standard**, or **Thick**.

## Settings

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


- To manage a library of images, color sets, Content Blocks, or Creator Kits, 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](#).

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, Content Blocks, and Creator Kits. 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

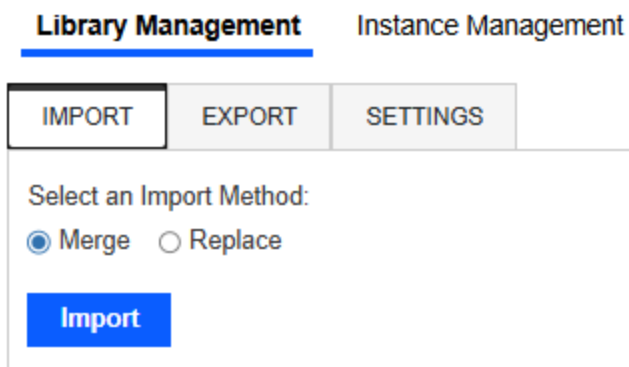
 can export the image library from the Development instance and import it to the Production instance.

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.

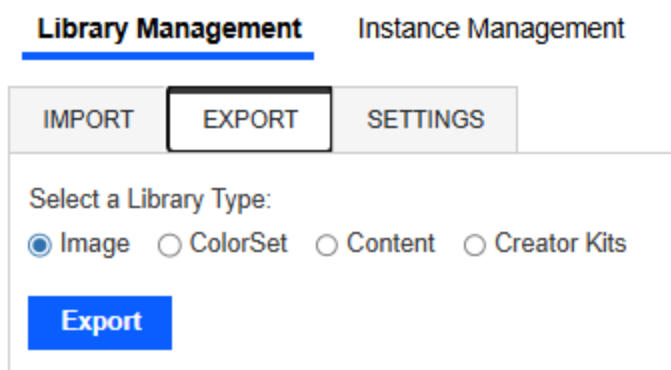


3. Click the **Import** button.

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 message box will display with the file location. To close the message 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.
- **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.

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

## 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.

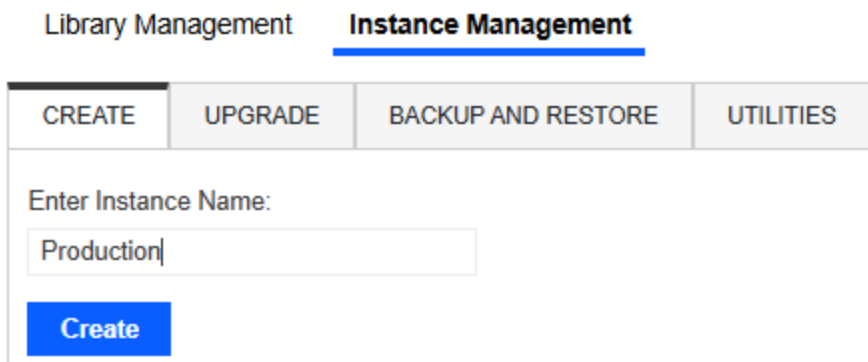
### Create a New Instance

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 these buttons 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. In **OneStream Solution Exchange**, go to the **Genesis** page.
2. In the **Download Details** drop-down menus, select the appropriate platform version and the most recent Genesis version.
3. Click the **DOWNLOAD** button.
4. Log in to OneStream.
5. Go to the Genesis instance > **Settings** > **Instance Management** > **UPGRADE**.
6. Click the **Upload Upgrade Instance** button.

The screenshot shows the 'Instance Management' tab selected in the top navigation bar. Below it, the 'UPGRADE' button is highlighted in the sub-navigation bar. The main content area displays 'Current Version: PV850-SV100' and a 'Select a Genesis Solution File' label above a file selection input field. A blue 'Begin Upgrade' button is located at the bottom left of the form.

7. Select the new solution package, and click 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.

8. When the selected file name displays in the **Select a Genesis Solution File** field, click 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](#).

9. When the **Upgrade in Progress** screen displays, click the **Complete Upgrade** button.

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

10. When the upgrade is complete, a message box will display with a confirmation. To close the message box, click 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.

- 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.

The screenshot shows the 'Instance Management' tab in the software interface. It features a sub-tab 'BACKUP AND RESTORE' which is currently active. Below this, there are two main sections: 'Location' and 'Backup'. The 'Location' section has a text box containing 'Documents/Public/GEN' and a blue 'Change' button below it. The 'Backup' section is titled 'Select Backup Type:' and contains two radio buttons: 'Full' (which is selected) and 'App Settings'. A blue 'Create' button is located at the bottom of the 'Backup' section.

- 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  button) or off (click the Hide Preview  button).

## 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 \$&S	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%	
<b>Revenues</b>	<b>778,855,017</b>	<b>778,998,678</b>	<b>143,660</b>	<b>0.02%</b>	
Cost of goods sold	106,482,062	114,474,764	(7,992,702)	-7.51%	
<b>Gross income</b>	<b>672,372,956</b>	<b>664,523,914</b>	<b>(7,849,042)</b>	<b>-1.17%</b>	
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%	
<b>Compensation</b>	<b>317,200,808</b>	<b>311,577,811</b>	<b>5,622,996</b>	<b>1.77%</b>	
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%	
<b>Total operating expenses</b>	<b>530,555,979</b>	<b>519,085,791</b>	<b>11,470,188</b>	<b>2.16%</b>	
Depreciation and amortization	50,177,447	45,373,071	4,804,377	9.57%	
<b>Total operating income</b>	<b>91,639,530</b>	<b>100,065,052</b>	<b>8,425,523</b>	<b>9.19%</b>	

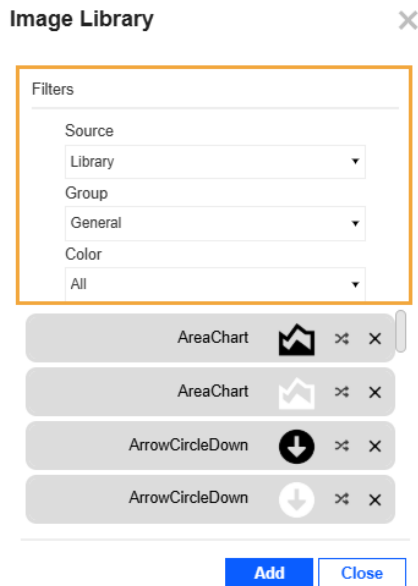
1. Navigation bar

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.

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

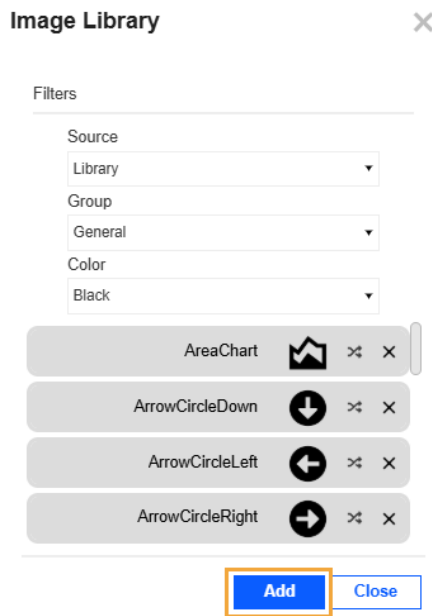
Use the **Source**, **Group**, and **Color** drop-down menus to filter the list of images.



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

## Add an Image

1. Click the **Image Library** button.
2. In the **Image Library** dialog box, 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.

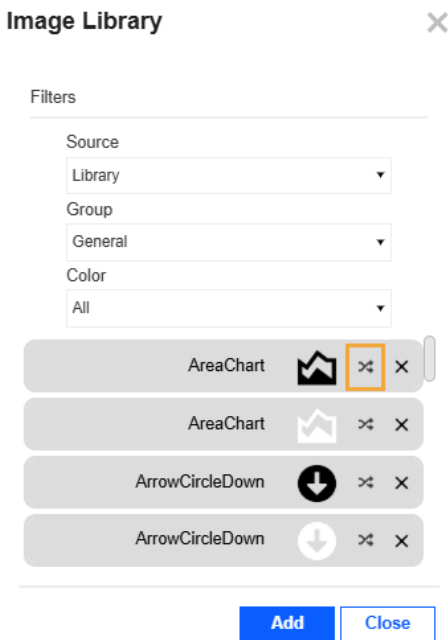


4. Select the .png image, and click the **Open** button.

## 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** dialog box, use the **Source**, **Group**, and **Color** drop-down menus to filter the list.
3. Next to the image, click the **Change the Selected Image** button.

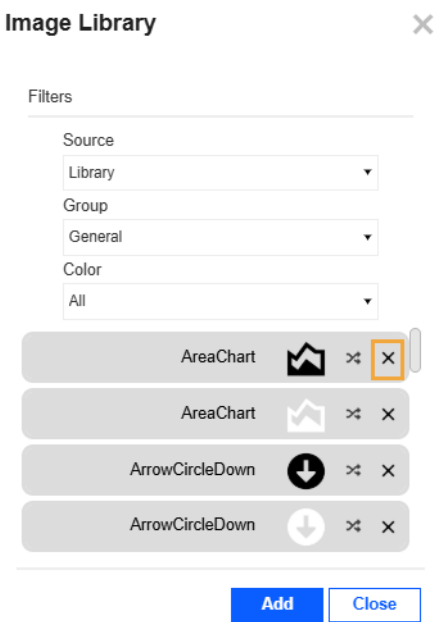


4. Select the .png image, and click the **Open** button.

## Delete an Image

1. Click the **Image Library** button.
2. (Optional) In the **Image Library** dialog box, use the **Source**, **Group**, and **Color** drop-down menus to filter the list.

3. Next to the image, click the **Delete the Selected Image** button.





# 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 preconfigured dashboard layout or component with a built-in setup wizard.
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 Administrator](#)

## 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	<ul style="list-style-type: none"><li>• Access Group on the Application Group settings</li><li>• Hide set to No on the Application Group settings</li></ul>
View a Navigation Group in the navigation bar or a Page in the page bar	<ul style="list-style-type: none"><li>• Access Group on the Navigation Group or Page settings</li><li>• No Access Type set to Hide on the Navigation Group or Page settings</li><li>• Hide set to No on the Navigation Group or Page settings</li></ul> <p>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:</p> <ol style="list-style-type: none"><li>1. In the <b>Access Group</b> drop-down menu, select the security group.</li><li>2. In the <b>No Access Type</b> drop-down menu, select <b>ShowBanner</b>.</li><li>3. In <b>No Access Banner</b>, type <b>banner_NoAccess_(App)_(Main)</b>.</li><li>4. In the <b>Hide</b> drop-down menu, select <b>No</b>.</li></ol>

Actions	Security Requirements
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.

## Security

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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
<ul style="list-style-type: none"><li>• Add Navigation Groups and Pages</li><li>• Link existing content to a Page</li><li>• Inject a Content Block to a Page</li></ul>	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. You can also view and download the guide in OneStream Solution Exchange.

Actions	Security Requirements
View content on the Preview tab	<ul style="list-style-type: none"><li>• Access Group on the Genesis Application Group, Navigation Group, and Page</li><li>• Security requirements of the content based on standard platform configuration</li></ul>
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 Content Blocks	Application security role ManageApplicationWorkspaces
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
<ul style="list-style-type: none"><li>• Add new images</li><li>• Replace existing images</li></ul>	<p>You must meet one of the following requirements:</p> <ul style="list-style-type: none"><li>• System security group Administrators</li><li>• Application security role AdministerApplication</li></ul>
Delete images	Maintenance Group on the Genesis instance Workspace

## Solution Administration

To install Genesis, you must meet one of the following requirements:

- 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
- RootAccountDim



## Reserved Words

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- RootEntityDim
- RootFlowDim
- RootScenarioDim
- RootUD1Dim
- RootUD2Dim
- RootUD3Dim
- RootUD4Dim
- RootUD5Dim
- RootUD6Dim
- RootUD7Dim
- RootUD8Dim
- Scenario
- Time
- UD1
- UD1Default
- UD2
- UD3
- UD4
- UD5
- UD6
- UD7

## Reserved Words

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- 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\_GV100\_PackageContents.zip

Identifier	Description
GEN	Solution ID
PV9.0.0	Minimum platform version required to run the solution <i>See the <a href="#">Upgrade Guide</a>.</i>
GV100	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.

# Setup and Installation

Before you install the solution, review these details.

- [Dependencies](#)
- [Select the Genesis Development Location](#)
- [Create the OneStream Development Application](#)
- [Install Genesis](#)

## Dependencies

Ensure that you have each of the following components installed.

Component	Description
9.0.0	Minimum platform version required to install this release  See the <i>Upgrade Guide</i> .

## 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](#).

**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.

There are security requirements to install Genesis. See [Solution Administration](#).

1. In **OneStream Solution Exchange**, go to the **Genesis** page.
2. In the **Download Details** drop-down menus, select the appropriate platform version and the most recent Genesis version.
3. Click the **DOWNLOAD** button.
4. Log in to OneStream.
5. On the **Application** tab, go to **Tools > Load/Extract**.
6. On the **Load** tab, use the **Select File** buttons to locate the solution package.
7. Click **Open**.
8. Click **OK** to complete the installation.