



Genesis Guide

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About This Guide

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

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

This guide is intended for the following audiences:

- End users who view content
- Designers, power users, and administrators who create, update, and manage content
- 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 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 designers configure content. See [Genesis Designer](#).
 - **Genesis Navigation:** End users consume the content built in Genesis Designer. See [Genesis Navigation](#).

User Roles

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

Setup and Installation

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

- [Genesis Dependencies](#)
- [Update the List of File Extensions](#)
- [Install Genesis](#)
- [Configure the Content Library](#)

NOTE: There are security requirements to install Genesis and manage the Content Block library. See [Genesis Security Requirements](#).

Genesis Dependencies

Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.

Update the List of File Extensions

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

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

File extension whitelisting is configured at the environment level.

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

Install Genesis

The *Getting Started with Solutions Guide* provides general instructions to install and configure OneStream Solutions. It also includes the recommended display settings, package file name information, advice for solution database migration, and considerations for modifications to solutions.

See the *Getting Started with Solutions Guide*.

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

CAUTION: 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.

Configure the Content Library

These are the sources for the Content Library:

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

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

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

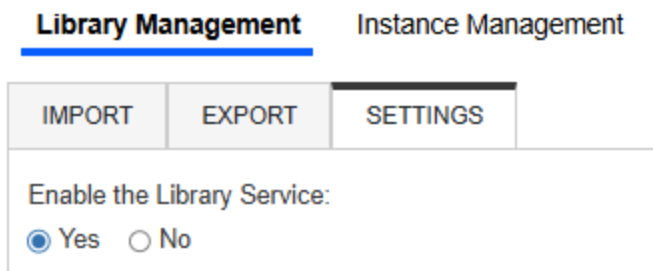
The Genesis Instance Workspace is available to all environments. It is required for on-premises environments and FedRAMP cloud environments. See [Import a Content Block to Local Content Library](#).

Enable Live Connection to the Exchange Store

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

1. In **Settings > Library Management**, select the **SETTINGS** tab.
2. Under **Enable the Library Service**, select an option:
 - Select the **Yes** radio button 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 the **No** radio button to turn off the integration with the Exchange Store. Only

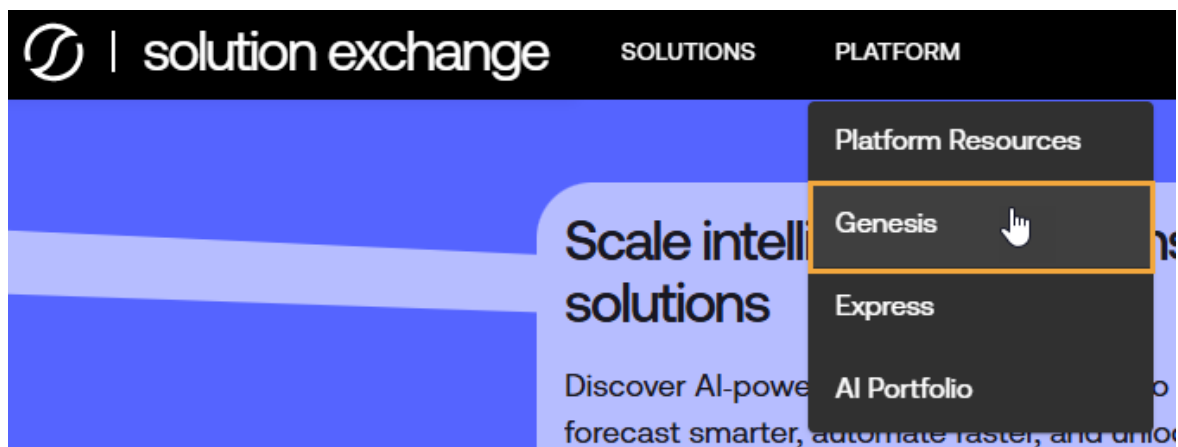
the library in the Genesis Instance Workspace will be available.



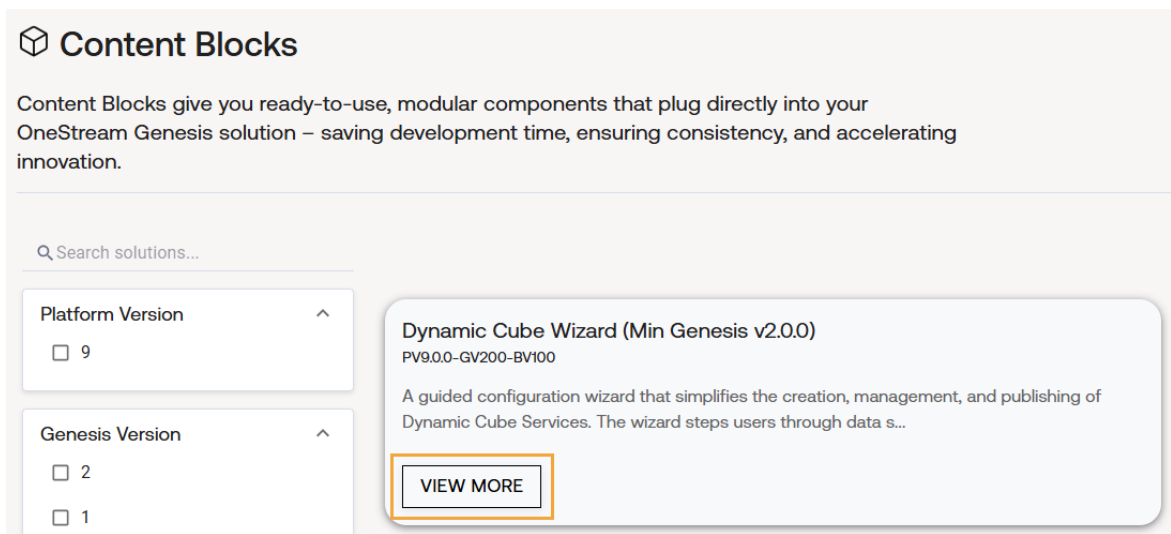
Import a Content Block to Local Content Library

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

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



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

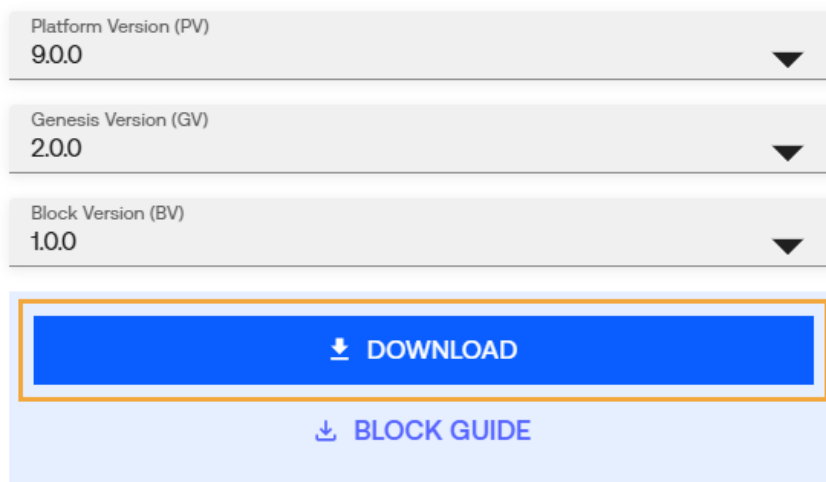


TIP: To find a specific Content Block, use the search field and filters as needed.

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

Dynamic Cube Wizard (Min Genesis v2.0.0)

A guided configuration wizard that simplifies the creation, management, and publishing of Dynamic Cube Services. The wizard steps users through data source configuration, dimension mapping, cube model publishing, and filtered data analysis. Advanced settings provide additional control for more refined configuration.



The screenshot displays the Dynamic Cube Wizard interface. It features three version selection dropdowns: Platform Version (PV) set to 9.0.0, Genesis Version (GV) set to 2.0.0, and Block Version (BV) set to 1.0.0. Below these, there is a prominent blue button labeled 'DOWNLOAD' with a download icon, which is highlighted by an orange border. Underneath the button is a light blue link labeled 'BLOCK GUIDE' with a download icon.

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

Genesis Navigation

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

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

Application Groups

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

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

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

Navigation Groups

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

Pages

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

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

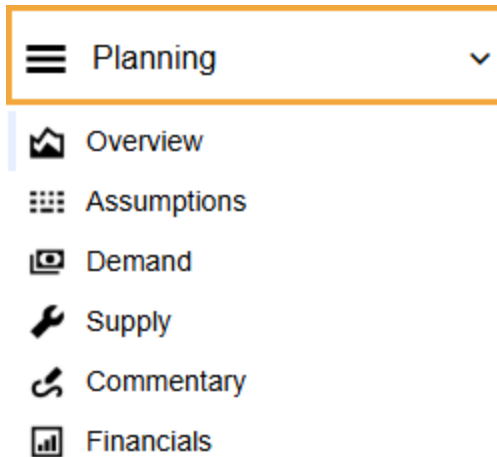
View Content in Genesis Navigation

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

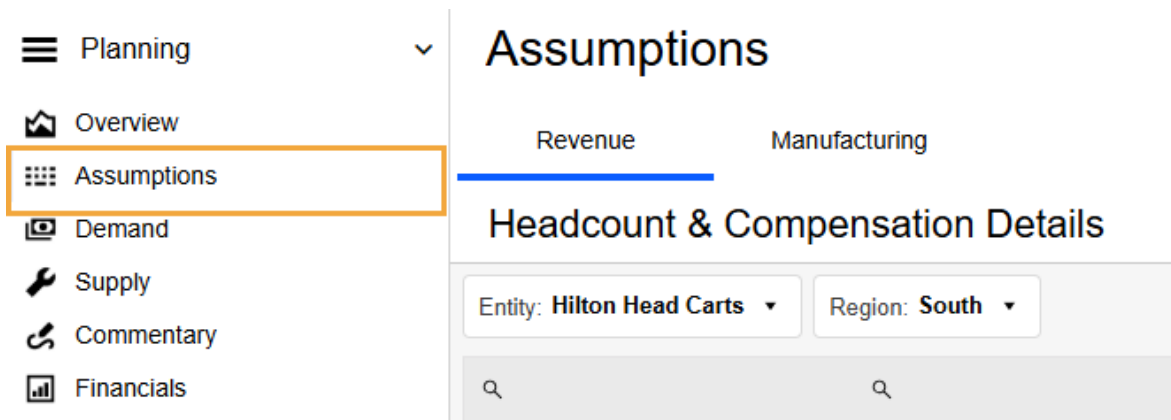
NOTE: There are security requirements for Genesis Navigation. See [Genesis Security Requirements](#).

Genesis Navigation

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



2. Select a Navigation Group.



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

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

Planning

Overview

Assumptions

Demand

Supply

Commentary

Financials

Home

Assumptions

Revenue

Manufacturing

Headcount & Compensation Details

Entity: Hilton Head Cars Region: South

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

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

Genesis Designer

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

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

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



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

NOTE: There are security requirements for Genesis Designer. See [Genesis Security Requirements](#).

Designer Home

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

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

Genesis



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

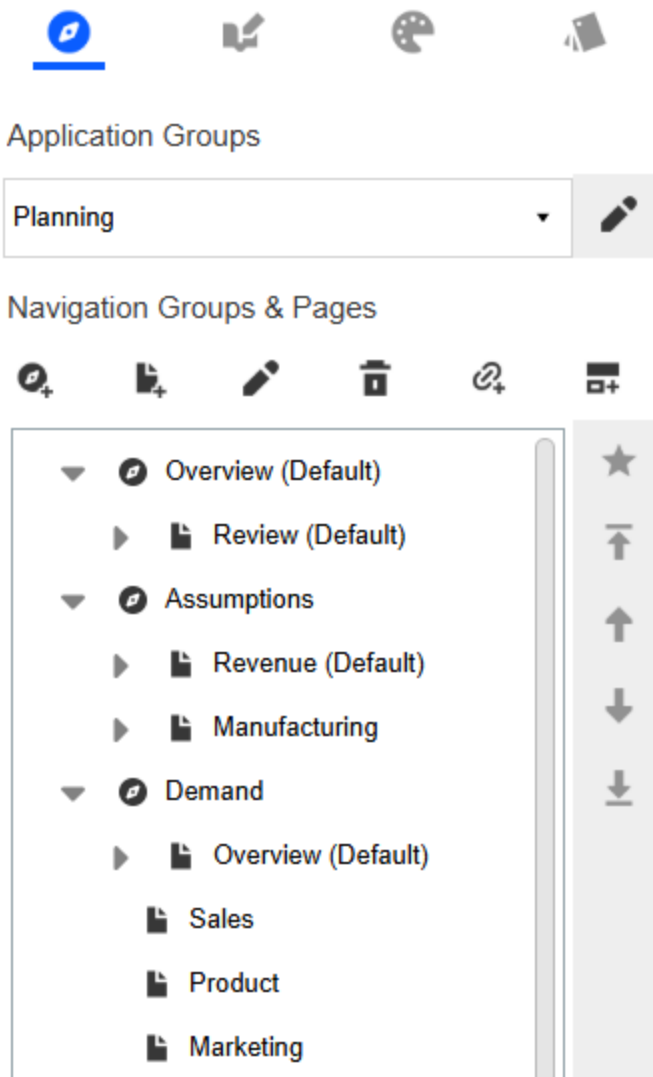
Navigation

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

The page includes the following sections:

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

Genesis



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

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

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

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

Preview Designer Content

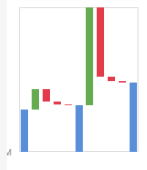
Overview

Forecast Summary Motors Division

Region: Global

	Actual Prior Yr	Curr Yr Variance	Forecast Curr Yr	Next Yr Variance	Forecast Next Yr
Cart Revenue	247,104,862	22,447,641	269,552,504	114,575,164	384,127,667
Accessory Revenue	4,541,646	80,108	4,621,753	579,886	5,201,639
Discounts	-12,582,325	-78,279	-12,660,604	-7,748,654	-20,409,258
Net revenue	239,064,183	22,449,470	261,513,653	107,406,396	368,920,049
Labor COGS	33,736,148	2,281,507	36,017,655	13,516,107	49,533,762
Material COGS	130,114,201	11,128,561	141,242,762	59,521,699	200,764,461
Overhead COGS	7,089,012	479,232	7,568,244	2,901,615	10,469,858
Cost of goods sold	170,939,360	13,889,301	184,828,661	75,939,420	260,768,081
Gross margin	68,124,822	8,560,170	76,684,992	31,466,976	108,151,968
Employee salary	4,805,244	1,316,081	6,121,324	3,493,045	9,614,369
Employee benefits & other	489,074	127,348	616,422	345,015	961,437
Compensation	5,294,318	1,443,429	6,737,746	3,838,060	10,575,806
Research & development	776,786	128,358	905,143	394,857	1,300,000
Marketing & advertising	3,557,245	525,098	4,082,343	257,087	4,339,430
Other operating expenses	4,896,553	712,470	5,609,023	305,857	5,914,880
Total operating expenses	14,524,901	2,809,354	17,334,255	4,795,861	22,130,116
Depreciation and amortization	7,242,212	1,306,299	8,548,511	1,937,761	10,486,272
Total operating income	53,602,333	4,444,617	58,888,236	24,633,354	75,535,130

Product: Refresh



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

Preview

Designer

Content

i

🔍

Cube View With Layouts Configuration

Cube View

Filters

Buttons

Layouts

Cube View Settings

Select Cube View

_cv_ForecastOverviewMain_mtr

Description

Forecast Summary Motors Division

↺

Default Header

Hidden

▼

Save

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

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

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

Content Block Detail

**Name**

Cube View With Layouts

Description

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

Category

Data (Cubes)

Modality

Universal

Created By

OneStream

Version

110

Minimum Genesis Version

100

Minimum Platform Version

9.0.0

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

Preview Designer **Content**

Forecast Summary Motors Division

Region: Global

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

Product: Refresh

Application Groups

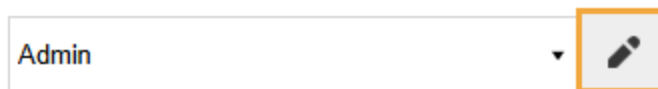
In the Application Groups drop-down menu, select the Application Group to view the associated Navigation Groups and Pages. The Application Groups are Home, Admin, Config, and Help.

Rename an Application Group

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

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

Application Groups



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

Display Settings

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

Property Editor



Edit Application Group Attributes

Navigation Path

Application Group: Admin

Display Settings

Description:

Reporting

ToolTip Text:

Standard Reports

Security Settings

Access Group:

Everyone ▼

Visibility Settings

Hide:

No ▼

Save

Cancel

4. Select 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. Select the **Edit the Selected Item** icon to the right of the drop-down menu.

Application Groups



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

Security Settings

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

Visibility Settings

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

Property Editor



Edit Application Group Attributes

Navigation Path

Application Group: Admin

Display Settings

Description:

Reporting

ToolTip Text:

Standard Reports

Security Settings

Access Group:

Everyone

Visibility Settings

Hide:

No

Save

Cancel

4. Select the **Save** button.

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

Navigation Groups, Pages, and Content

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

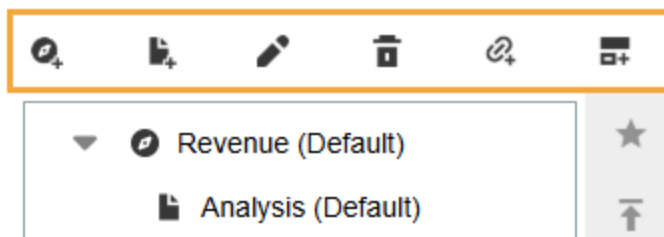
Pages display content and have a one-to-one relationship with that content. Content can be linked to a Page from existing dashboards or injected using Content Blocks.

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

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

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

Navigation Groups & Pages



See the following sections:

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

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

Create a Navigation Group

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



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

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

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

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

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

Property Editor



Application Group Admin

Navigation Group Revenue

Description Revenue

Save

Cancel

3. Select the **Save** button.

Create a Page

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



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

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

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

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

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

Property Editor



Application Group Admin

Navigation Group Revenue

Page

Description

Save

Cancel

4. Select the **Save** button.

Edit a Navigation Group or Page

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



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

Display Settings

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

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

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

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

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

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

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

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

- **Access Group:** Select the security group that will have access to view this item. These security groups are in System > Security > Groups. Default Navigation Groups and Pages must be set to Everyone.
- **No Access Type:** Select the view for users without access.
 - **ShowBanner:** Users without access will see the item listed in the navigation bar or page bar. But, when they select it, they will see the dashboard defined in the No Access Banner setting instead of the Content Block or linked dashboard.

- **Hide:** Users without access will not see the item listed in the navigation bar or page bar.
- **No Access Banner:** If you selected ShowBanner as the No Access Type, enter a dashboard name to display. The default is banner_NoAccess_(App)_(Main), which displays the text: NO ACCESS.

Visibility Settings

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

Title Bar Settings (Navigation Group only)

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

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

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

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

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

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

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

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

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

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

Action Manager



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

☐ Set Workflow POV

Workflow Profile

Workflow Scenario

Workflow Time

☐ Set Cube POV



Navigation

Page Type

Page Item

Close

4. Select the **Save** button.

Property Editor ✕

Navigation Path
Application Group Admin
Navigation Group Revenue

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

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

Visibility Settings
Hide No

Title Bar Settings
Hide Yes
Font Size 28

 Save Cancel

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

Edit a Content Block Description

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

To edit a Content Block description, follow these steps:

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



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

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

Delete a Navigation Group, Page, or Content Item

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

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

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

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



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

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

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

Link Existing Content from a Dashboard

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



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

Shared Workspace Browser

Shared Workspace Link

Shared Workspaces

Default

Filter (Contains)

✓

✕

Dashboard Type

☒ All ☐ Top Level Only

Available Dashboards

0_1_Header_Title_FXM

0_1b_Header_Border_FXM

0_2_Header_Help_FXM

0_3_Frame_Central_FXM

0_4_Sidebar_Menu_FXM

0_5_Frame_Content_FXM

0_AADashboard_ACTEXT

0_AAReport_ACTEXT

0_ActivityAnalysisChart_OSDC - Task Concurrency

0_ActivityAnalysisMainChart_OSDC

0_5_Sidebar_Menu_FXM

Save

Cancel

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

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

Inject a New Content Block

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

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



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

Content Library ×

Filter (Contains) ✓ ×

Platform v9.0.0 Genesis v2.1.0

Library Source	Category	Modality	Availability
Genesis Instance	All	All	All



Advanced Dashboard Layouts
By OneStream • v2.1.0 • Min Platform v9.0.0 • Min Genesis v2.0.0
Design a custom layout to organize your content. Create up to 12 rows, each containing up to 12 cards. You can split any card into multiple vertically stacked cards for added flexibility. Configure each card to display dashboards or other content blocks, enabling you to build views tailored to your audience and objectives.



Large Data Grid
By OneStream • v2.0.0 • Min Platform v9.0.0 • Min Genesis v2.0.0
Display large data sets in a paginated grid that supports sorting and filtering for quick analysis. A Data Adapter is leveraged as the data source, which can include Cube, relational, or external data. Parameters in the connected Data Adapter are surfaced as embedded filters, which can be added or removed as needed.

K < 1 > X

Rows 1-2 of 2

Cancel

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

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

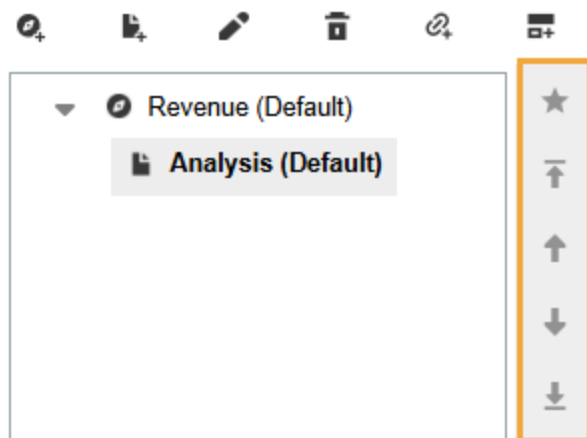
TIP: Select Details for more information about the Content Block.

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

Reorder List

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

Navigation Groups & Pages



- To define the default view for users in Genesis Navigation, select an item and then select the **Set As Default**  icon. Then, the Navigation Group or Page displays by default when the parent item is selected.

- To move an item to display first in the navigation tree, select it and then select the **Move To First**  icon.
- To move an item up in the navigation tree, select it and then select the **Move Up**  icon.
- To move an item down in the navigation tree, select it and then select the **Move Down**  icon.
- To move an item to display last in the navigation tree, select it and then select the **Move To Last**  icon.

Content Management

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

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

The Content Management page includes the following sections:

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

Content Management

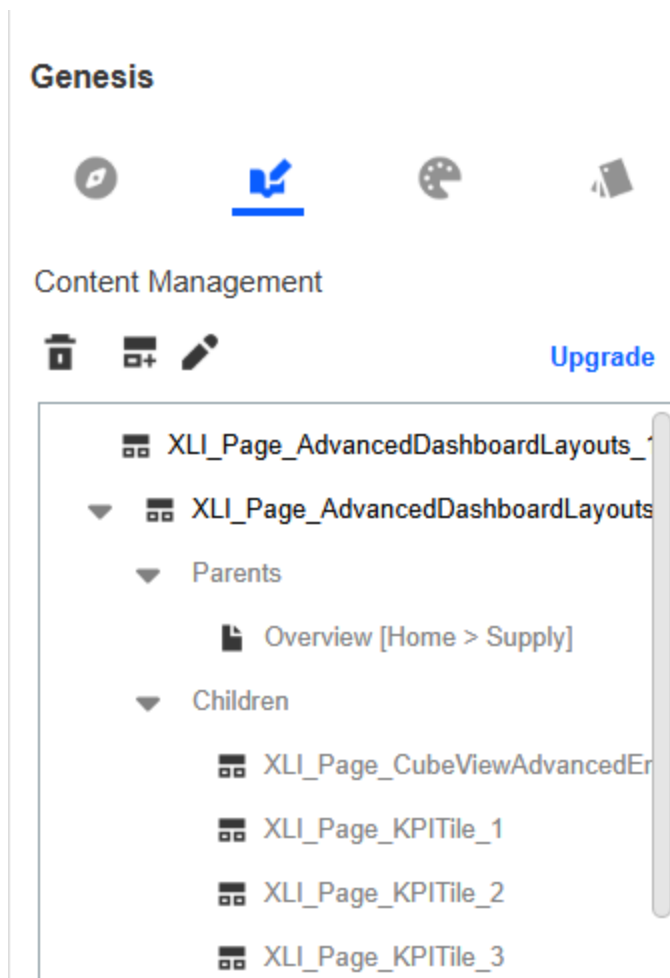


Upgrade

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

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

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

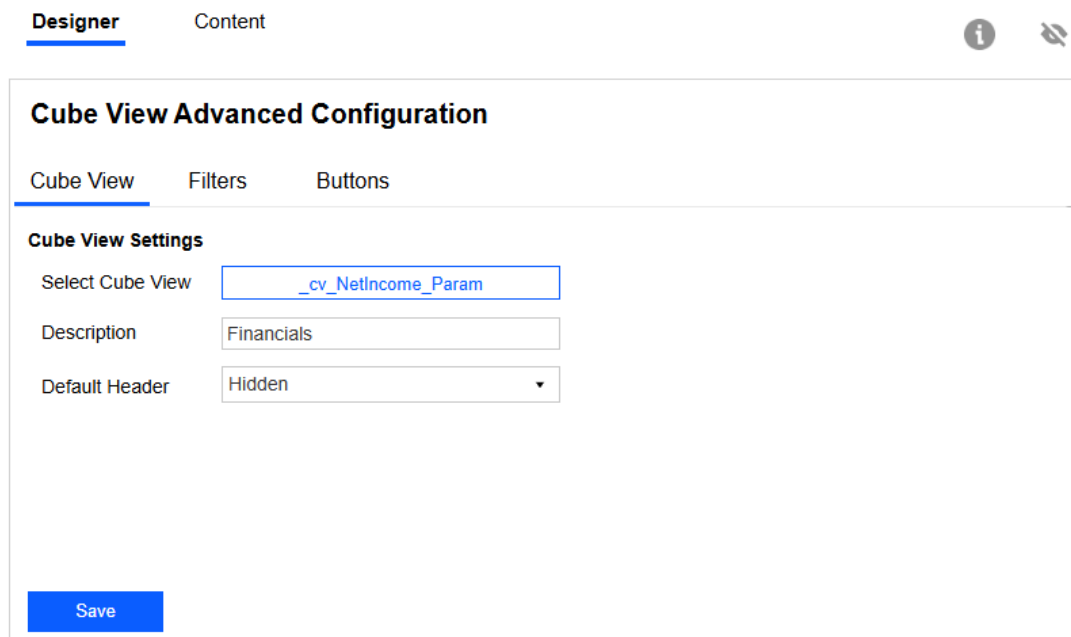


See the following sections:

- [Delete a Content Block](#)
- [Inject a Content Block](#)
- [Edit a Content Block Description](#)
- [Upgrade Content Blocks](#)
- Select a Content Block. Then, to the right, you can select the Designer and Content tabs to view and configure the content.

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

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



The screenshot shows the 'Designer' tab selected in the Genesis Designer interface. At the top, there are two tabs: 'Designer' (active) and 'Content'. To the right of these tabs are two icons: an information icon (i) and a hide preview icon (eye with a slash). Below the tabs is a section titled 'Cube View Advanced Configuration'. Inside this section, there are three sub-tabs: 'Cube View' (active), 'Filters', and 'Buttons'. Under the 'Cube View' sub-tab, there is a section titled 'Cube View Settings'. This section contains three configuration options: 'Select Cube View' with a text input field containing '_cv_NetIncome_Param', 'Description' with a text input field containing 'Financials', and 'Default Header' with a dropdown menu set to 'Hidden'. At the bottom left of the configuration area is a blue 'Save' button.

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

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

Content Block Detail 

Name
Cube View Advanced

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

Category
Data (Cubes)

Modality
Universal

Created By
OneStream

Version
110

Minimum Genesis Version
100

Minimum Platform Version
9.0.0

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

Designer

Content

Select Entity: Rocky Mtn Clubs

Selected Cell: - EUS01

Comments Edit

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

Undo/Clipboard

Font

Club Parts

Acme Nexus Series

GolfStream Epic

Mach Speed

0200M400M

Delete a Content Block

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

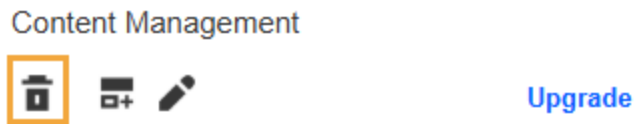
CAUTION: Deleting a Content Block is permanent. It cannot be undone.

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

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

To delete a Content Block, follow these steps:

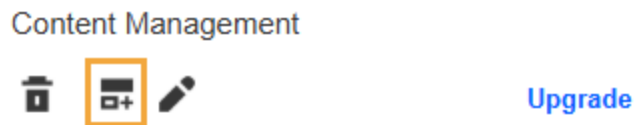
1. In the navigation tree, select the Content Block.
2. Select the **Delete the Selected Item** icon.



Inject a Content Block

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

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



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

Content Library

Filter (Contains) ✓ ✕

Platform v9.0.0 Genesis v2.1.0

Library Source	Category	Modality	Availability
Genesis Instance	All	All	All

Advanced Dashboard Layouts
By OneStream • v2.1.0 • Min Platform v9.0.0 • Min Genesis v2.0.0
Design a custom layout to organize your content. Create up to 12 rows, each containing up to 12 cards. You can split any card into multiple vertically stacked cards for added flexibility. Configure each card to display dashboards or other content blocks, enabling you to build views tailored to your audience and objectives.

Large Data Grid
By OneStream • v2.0.0 • Min Platform v9.0.0 • Min Genesis v2.0.0
Display large data sets in a paginated grid that supports sorting and filtering for quick analysis. A Data Adapter is leveraged as the data source, which can include Cube, relational, or external data. Parameters in the connected Data Adapter are surfaced as embedded filters, which can be added or removed as needed.

K < 1 > X

Rows 1-2 of 2

Cancel

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

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

TIP: Select Details for more information about the Content Block.

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

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

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

Edit a Content Block Description

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

To edit a Content Block description, follow these steps:

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

Content Management



Upgrade

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

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

Upgrade Content Blocks

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

See the following sections:

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

Compatibility Requirements

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

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

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

View Upgrade Availability for Content Blocks

1. Select **Upgrade**.

Content Management



Upgrade

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

Upgrade Content Blocks



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

Library Source **a**

Upgrade Status **b**

Genesis Instance

Needs Upgrade

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

K < 1 > X

Rows 1-21 of 21

Close

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

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

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

Block Settings



Display Settings

Block XLI_Page_CubeViewAdvanced_1

Description Manufacturing Assumptions

Is Added in These Pages or Blocks

 Manufacturing [Home > Assumptions]

Close

Upgrade a Content Block

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

1. Select **Upgrade**.

Content Management



Upgrade

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

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

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

Upgrade Content Blocks

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

Library Source

Genesis Instance

Upgrade Status

Needs Upgrade

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

K < 1 > X

Rows 1-21 of 21

Close

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

Library Source Filter

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

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

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

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

Upgrade Status Filter

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

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

Force Upgrade

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

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

Requirements

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

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

Force Upgrade a Content Block

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

1. Select **Upgrade**.

Content Management



Upgrade

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

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

method manually.

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

Eligible Content Blocks

You can force upgrade the following Content Blocks:

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

Colors

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

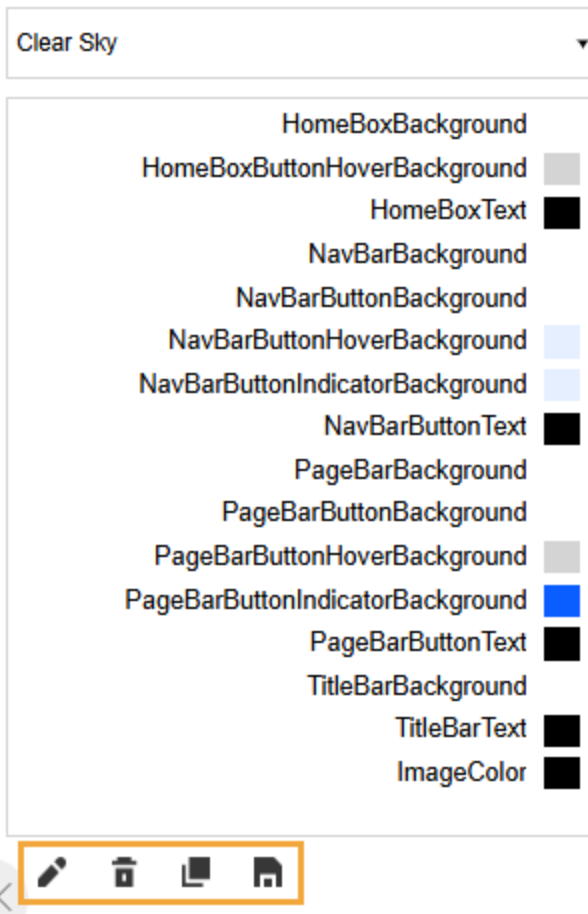
The Colors page is organized into the following sections:

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

Color Options

Current Selection: Clear Sky

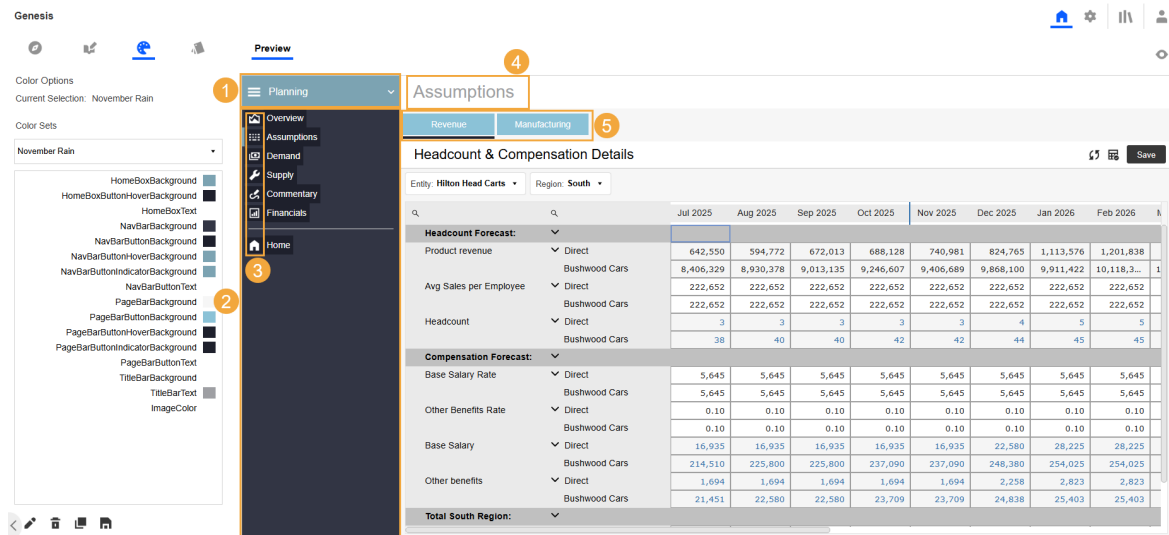
Color Sets



See the following sections:

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

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



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

Color Set Properties

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

Home Box

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

Navigation Bar

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

See [Navigation Bar](#).

Page Bar

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

See [Page Bar](#).

Title Bar

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

Image

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

Apply a Color Set

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

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



Edit a Color Set

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



3. On the **ColorSet Editor** slide-out panel, in the field for each option, update the properties.
See [Color Set Properties](#).
 - Enter hex color values using the format #FF000000 or a OneStream color name, which is a name from the standard list of colors used in OneStream, for example, for a button component.
 - To make an option transparent, enter **Transparent**.
 - To update **ImageColor**, from the drop-down menu, select **Black** or **White**.

ColorSet Editor



Edit ColorSet Values

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

Save

Cancel

4. Select the **Save** button.

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

Delete a Color Set

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

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

To delete a color set, follow these steps:

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



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

Copy a Color Set

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

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



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

ColorSet Editor ×

Copy ColorSet

ColorSet Name:

Save Cancel

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

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

Styles

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

The Styles page is organized in the following sections:

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

Genesis



Navigation Bar

Application Group Display
☒ Menu ☐ Image

Width
250

Button Height
Small

Selected State Type
☒ Indicator ☐ Highlight

Indicator Size
☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness
☐ Thin ☐ Standard ☒ Thick

Page Bar

Button Width
145

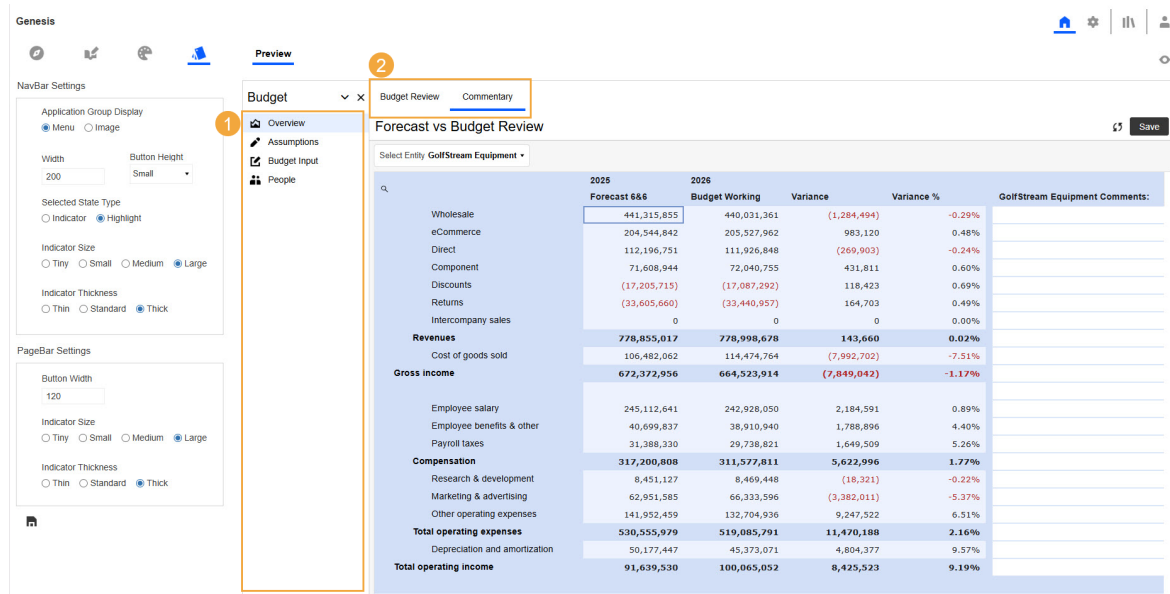
Indicator Size
☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness
☐ Thin ☐ Standard ☒ Thick



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

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



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

Configure Style Settings

Configure style settings before applying them to a Genesis instance.

Navigation Bar

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

Application Group Display

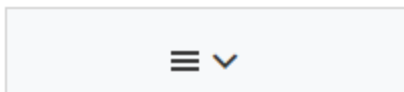
- **Menu:** Select to display the Application Group description in the navigation bar drop-down menu.

Preview



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

Preview



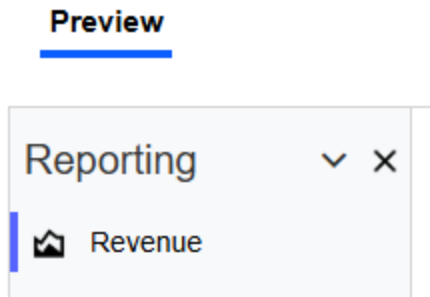
Width: Enter the number of pixels to set the width of the navigation bar.

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

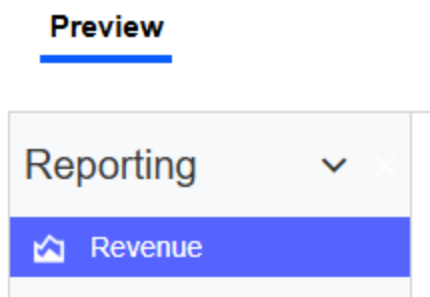
TIP: Increase the navigation bar width or button height to accommodate longer names or larger font sizes.

Selected State Type

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



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



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

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

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

Page Bar

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

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

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

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

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

Apply Style Settings

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

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

tab.

Genesis



Navigation Bar

Application Group Display

☒ Menu ☐ Image

Width

Button Height

Selected State Type

☒ Indicator ☐ Highlight

Indicator Size

☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness

☐ Thin ☐ Standard ☒ Thick

Page Bar

Button Width

Indicator Size

☐ Tiny ☐ Small ☐ Medium ☒ Large

Indicator Thickness

☐ Thin ☐ Standard ☒ Thick



Settings

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

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

Library Management

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

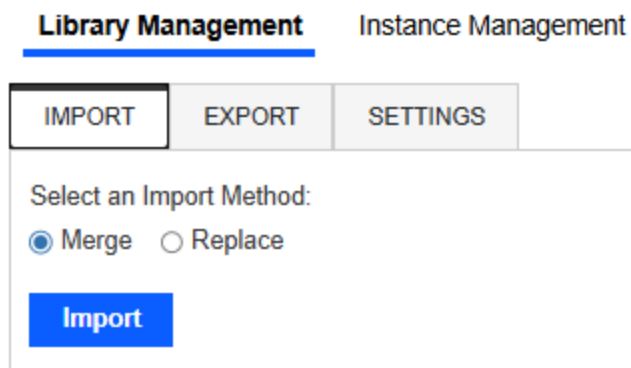
Example: If you customize several images to use in a Development instance and want to use them in production, you can export the image library from the Development instance and import it to the Production instance.

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

Import a Library

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

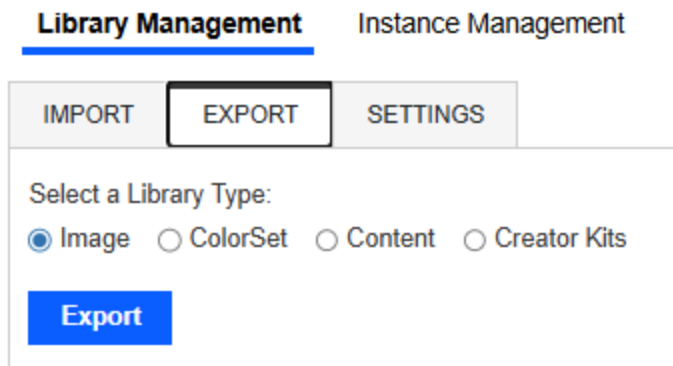
1. In **Settings > Library Management**, select the **IMPORT** tab.
2. Select the import method.
 - Select the **Merge** radio button for the following methods:
 - Add new imported items to the library
 - Update existing items to the imported items
 - Keep current items that are not in the imported library
 - Select the **Replace** radio button 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. Select the **Import** button.
4. Select the file to import.
5. Select the **Open** button.

Export a Library

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



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

Enable Library Service

These are the sources for the Content Library:

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

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

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

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

To update the library service, follow these instructions:

1. In **Settings > Library Management**, select the **SETTINGS** tab.
2. Under **Enable the Library Service**, select an option:
 - Select the **Yes** radio button 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 the **No** radio button to turn off the integration with the Exchange Store. Only the library in the Genesis Instance Workspace will be available.

Library Management Instance Management

IMPORT EXPORT **SETTINGS**

Enable the Library Service:

☒ Yes ☐ No

Enable Force Upgrade Mode for Content Blocks

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

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

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

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

See [Force Upgrade](#).

Instance Management

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

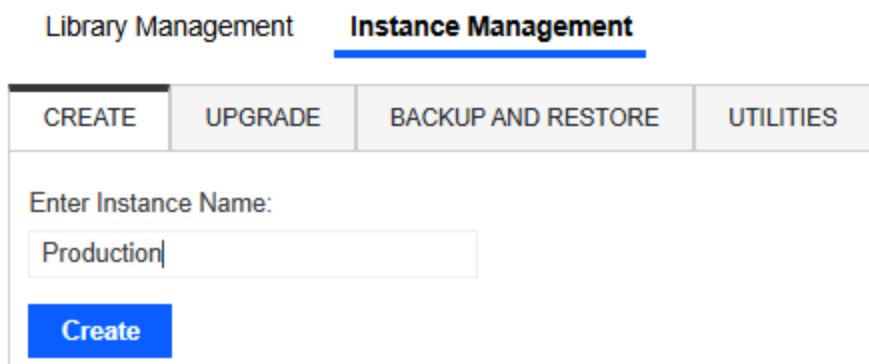
Create a New Instance

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

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

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

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



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

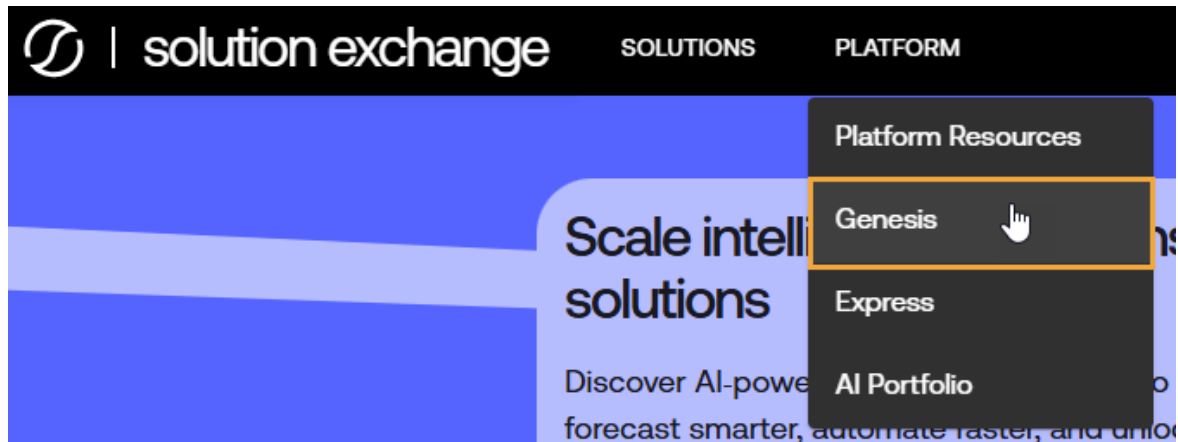
NOTE: The instance name must be unique and use alphanumeric characters (A–Z, a–z, and 0–9). The maximum number of characters is 80. The name cannot include symbols or reserved words. See [Reserved Words](#).

3. Select the **Create** button.

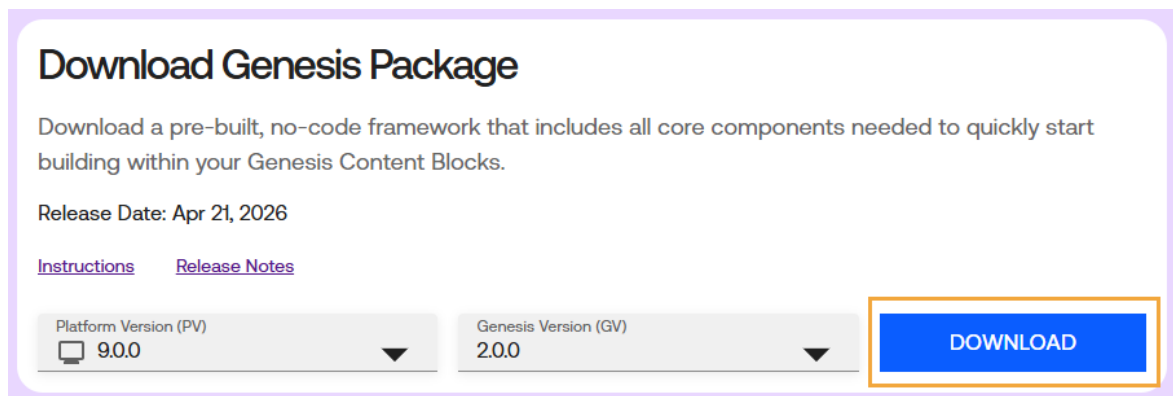
Upgrade an Instance

Upgrade an instance of Genesis to the latest release.

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



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



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

Library Management **Instance Management**

CREATE **UPGRADE** BACKUP AND RESTORE UTILITIES

Current Version: PV850-SV100

Select a Genesis Solution File

Begin Upgrade

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

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

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

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

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

10. Follow the process for the Genesis version you are upgrading from.

- Upgrading from Genesis Version 2.0.0 or later:
 - a. When the upgrade is complete, refresh the page.
 - Upgrading from Genesis Version 1.1.0 or earlier:
 - a. When the **Upgrade in Progress** screen displays, select the **Complete Upgrade** button.
- IMPORTANT:** Do not navigate away from the page until the upgrade is complete.
- b. When the upgrade is complete, a dialog box will display with a confirmation. To close the dialog box, select the **OK** button.

Back Up an Instance

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

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

1. In **Settings > Instance Management**, select 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, select the Change button, select a new folder in the Application Database, and click the Select Folder button.

3. Under **Backup**, select the type of backup file to create.

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

Library Management

Instance Management

CREATE

UPGRADE

BACKUP AND RESTORE

UTILITIES

Location

Documents/Public/GEN

Change

Backup

Select Backup Type:

☒ Full ☐ App Settings

Create

4. Select 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**, select 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. Select 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**, select 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 turned off

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 (select the Show Preview  icon) or off (select the Hide Preview  icon).

Image Library

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.

The screenshot shows the Genesis Designer interface. At the top, there are three tabs: 'Preview', 'Designer', and 'Content'. Below these, there's a 'Budget' section with a 'Budget Review' tab selected. The main area displays a 'Forecast vs Budget Review' table for 'GolfStream Equipment'. The table compares 2025 and 2026 data across various categories. The table is divided into sections for Revenues, Gross income, Compensation, and Total operating expenses. A 'Save' button is visible in the top right corner of the table area.

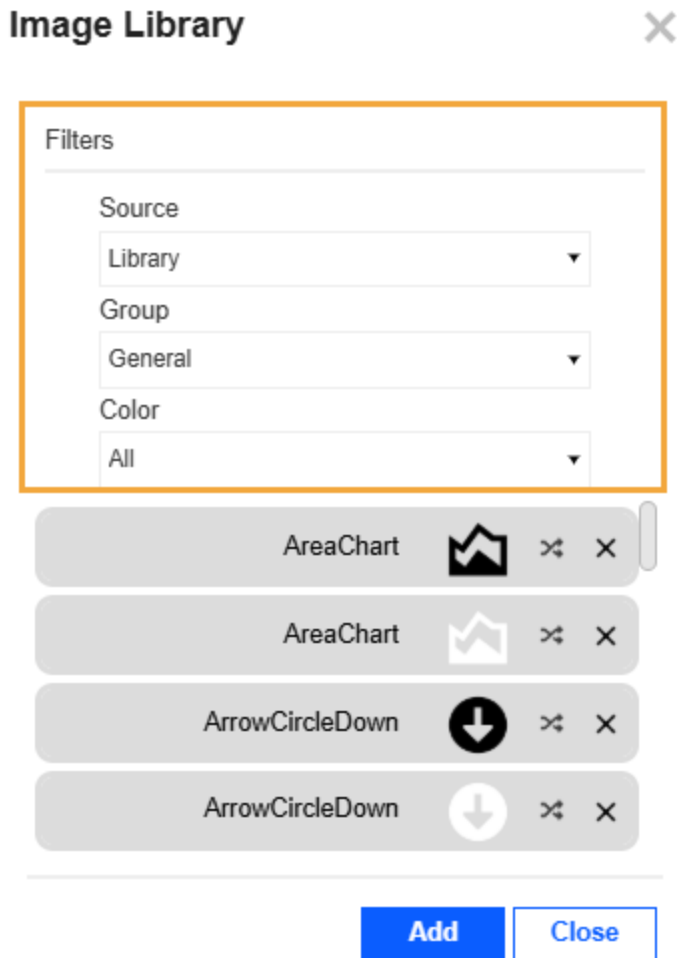
	2025 Forecast 6&6	2026 Budget Working	Variance	Variance %	GolfStream Equipment Comments:
Wholesale	441,315,855	440,031,361	(1,284,494)	-0.29%	
eCommerce	204,544,842	205,527,962	983,120	0.48%	
Direct	112,196,751	111,926,848	(269,903)	-0.24%	
Component	71,608,944	72,040,755	431,811	0.60%	
Discounts	(17,205,715)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

1. Navigation bar

2. Page bar

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

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

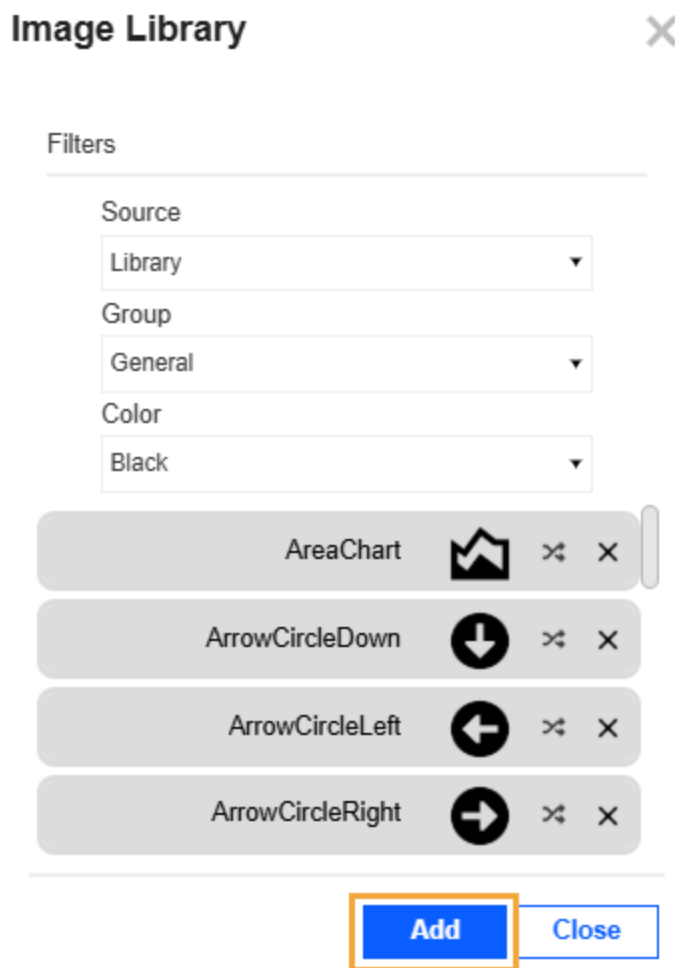


In the Image Library, you can add, replace, and delete images.

Add an Image

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

3. Select the **Add** button.

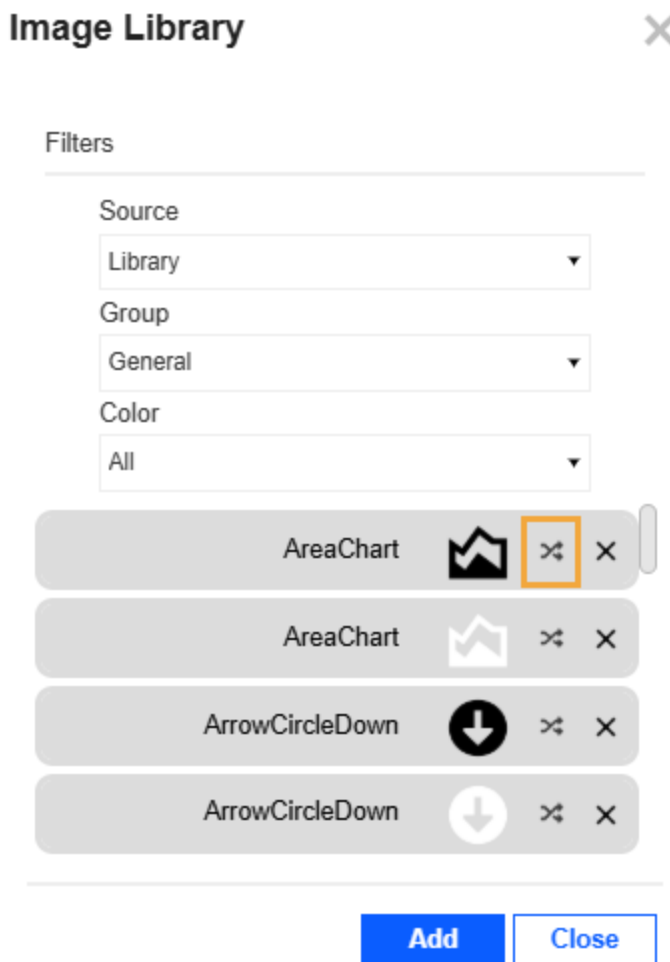


4. Select the .png image, and select the **Open** button.

Replace an Image

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

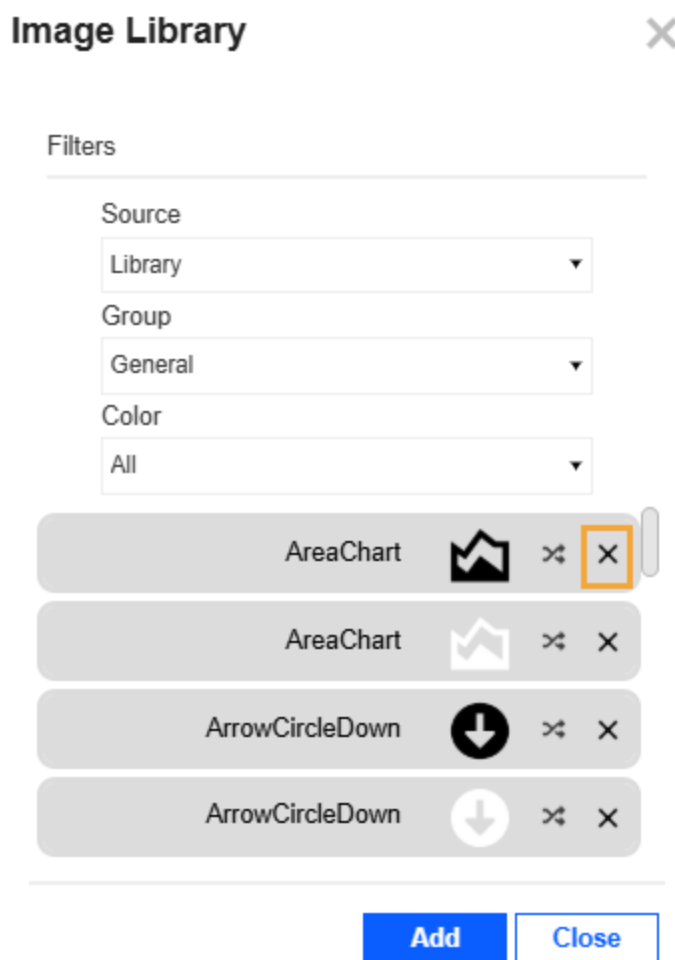
1. Select the **Image Library** button.
2. (Optional) In the **Image Library** slide-out panel, use the **Source**, **Group**, and **Color** drop-down menus to filter the list.
3. Next to the image, select the **Change the Selected Image** icon.



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

Delete an Image

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



Glossary

The following terms and their definitions are specific to Genesis.

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

Genesis Security Requirements

This section describes the security requirements for Genesis, organized around the user roles:

- Administrators install and maintain Genesis. See [Administrators](#).
- Designers build and configure content in Genesis Designer. See [Designers](#).
- End users consume content in Genesis Navigation. See [End Users](#).

Administrators

Administrators install Genesis, import libraries if needed, and manage instances.

Requirements

To become an administrator, you must a member of the following group:

- System security group Administrators

Key Actions

Administrators can complete the following key actions:

- Install Genesis
- View and access the Settings page
- Import, export, and manage libraries for images and Content Blocks

- Create new instances
- Upgrade, back up, and restore Genesis

Designers

Designers build and configure navigation, content, colors, and styles in Genesis Designer.

Requirements

To open Genesis Designer, you must be a member of all of the following groups:

- Access Group on the Dashboard Profile {Genesis Instance Name} Designer, which is set to Everyone by default
- Access Group on the Genesis instance Workspace, which is set to Everyone by default
- Group assigned to the application security role ManageApplicationWorkspaces
- Group assigned to the application security role AdministerApplicationWorkspaceAssemblies

NOTE: A user who is a member of the system security group Administrators or the group assigned to the application security role AdministerApplication has designer access automatically. They do not need to be in a group assigned to additional application security roles.

Key Actions

Designers can complete the following key actions:

- Edit Application Groups
- Add, edit, and delete Navigation Groups and Pages
- Link existing content and inject or upgrade Content Blocks
- Delete Content Blocks
- View and edit colors and styles
- Add, replace, and delete images in the Image Library

End Users

End users view the content in Genesis Navigation that was published by designers.

Requirements

To open Genesis Navigation, you must be a member of the following groups:

- Access Group on the Dashboard Profile {Genesis Instance Name} Navigation, which is set to Everyone by default
- Access Group on the Genesis instance Workspace, which is set to Everyone by default

Visibility

Visibility for end users is controlled by object and configured by the designer in Genesis Designer.

Genesis Security Requirements

Object to View	Requirements
Application Group in the drop-down menu	• Member of the Access Group set for the Application Group • Application Group is not hidden (Hide property set to No)
Navigation Group in the navigation bar or Page in the page bar	• Member of the Access Group set for the Navigation Group or Page • Navigation Group or Page is not hidden (Hide property set to No)
Linked content or an injected Content Block on a Page	Standard platform security for the content, for example, a Cube View requires access to that Cube View and its underlying cube data

Reserved Words

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

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

Reserved Words

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

Reserved Words

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