BI Viewer Content Block Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

Dependencies: BI Viewer's native Edit functionality is available in the browser only.

Jump to Release Notes

Table of Contents

Overview

The BI Viewer Content Block uses pre-configured data sources and the BI Viewer Designer to allow users to create their own visualizations. Specific data sets are assigned to the block and can use external or internal data sources. 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.

> **NOTE:** This block is browser only; the BI Viewer Designer is only available in the browser.

This content block is best served as a standalone content block. For more drill-down analysis and embedding capabilities, see the BI Viewer Embedded Content Block Guide for more details.

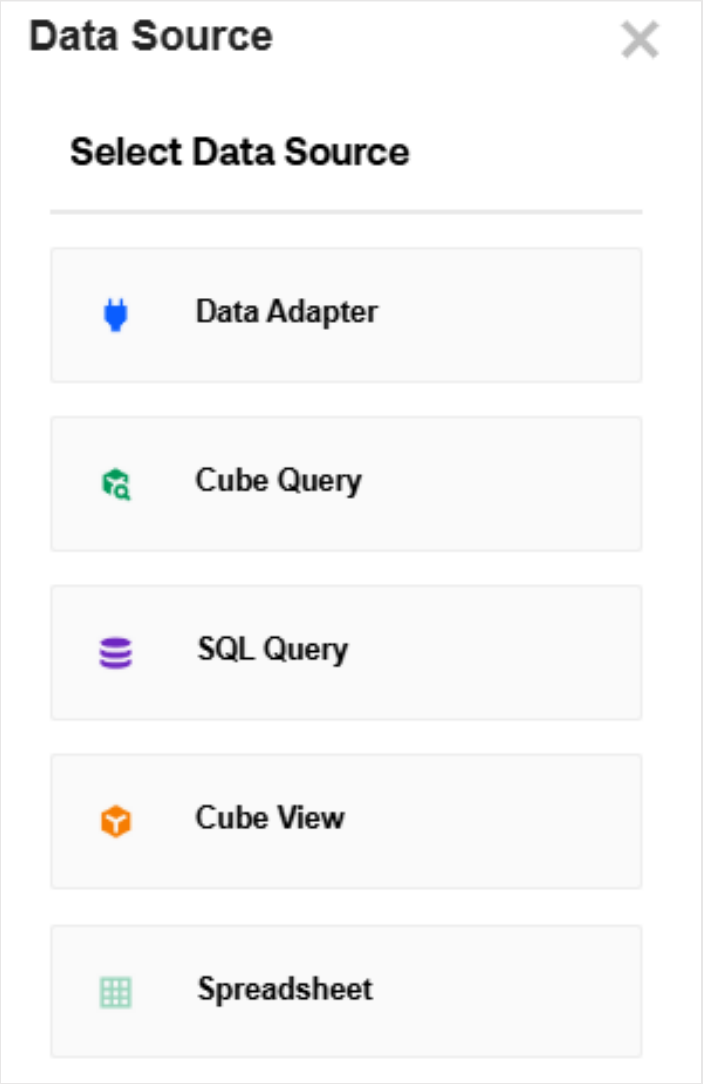
Use Cases

- **Financial or Operational Analytics**
    - The Dashboard only displays the visualizations rendered from this block.

Designer Page

The designer page has two tabs: Data and Settings. The Data Tab is where you define the data source(s) you want to use with BI Viewer.

Click Add Data and select your Data Source.

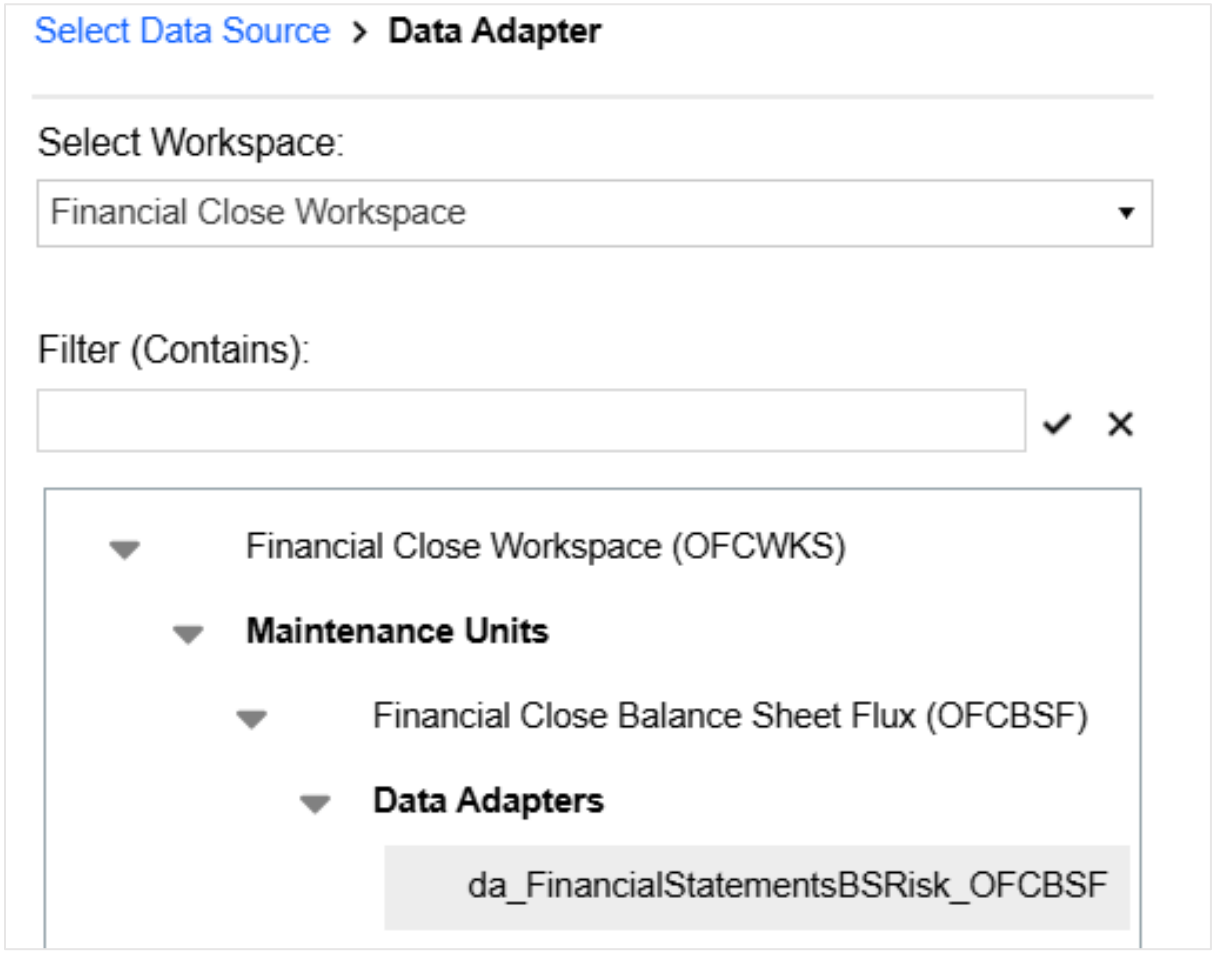


NOTE: Data Sources containing OneStream objects (e.g., Parameters, Cube Views, Data Adapters, etc.) must be stored in a **shareable** Workspace. Set the Shareable property to True on all applicable Workspaces; this excludes the Default Workspace.

See Appendix 1 for more information on Workspace Requirements and Parameter behavior.

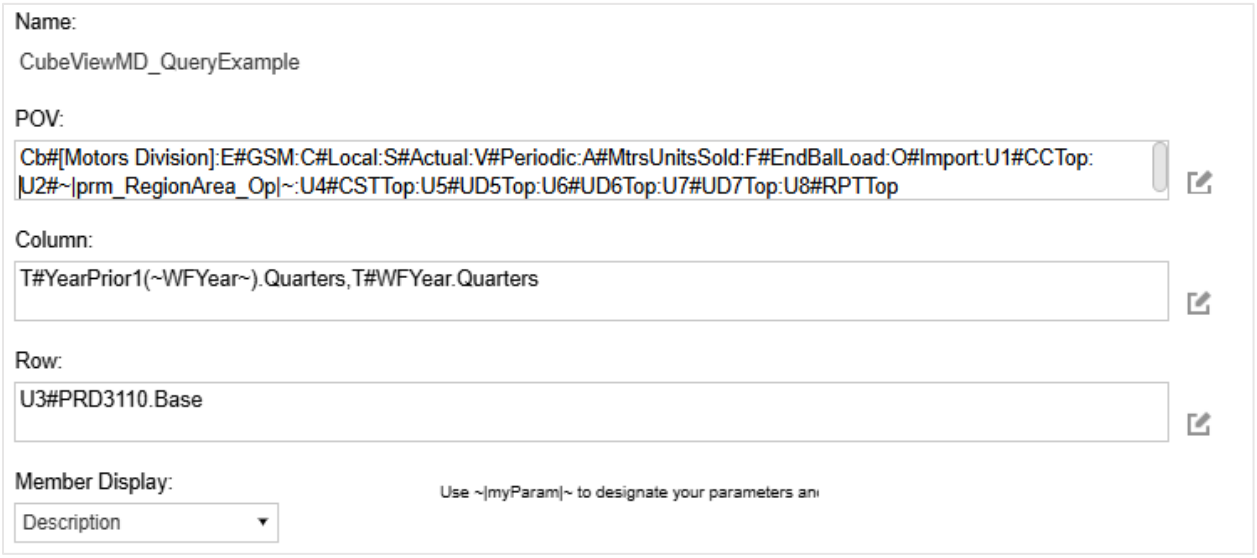
Data Source Types

Data Adapter
This allows you to assign an existing Data Adapter stored in Application Workspaces. All Data Adapter Types are supported.



Cube Query

This is a custom Cube query that behaves like a Cube View. Define the POV and Row/Column set just like you would in a Cube View. Once you save your query, the system dynamically creates a Cube View and Cube View MD Data Adapter. This eliminates the need to have a pre-existing Cube View or Data Adapter.



> **NOTE:** You can use standard OneStream Parameters in your query such as a Member List or Member Dialog or standard OneStream Substitution Variables such as |WFTime| or |WFScenario|.
> The syntax must be as follows:
> **Parameter Syntax:** ~|myParam|~
> Substitution Variable Syntax: ~mySubVar~

Click Preview to run the query and see the results:

	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
Street Legal 2G	507.00	569.00	508.00	490.00	390.00	329.00
Crusin 2L	434.00	358.00	454.00	425.00	399.00	519.00
Crusin 4L	628.00	555.00	566.00	537.00	700.00	704.00
Crusin 4A	337.00	295.00	278.00	325.00	404.00	323.00
Crusin 6L						

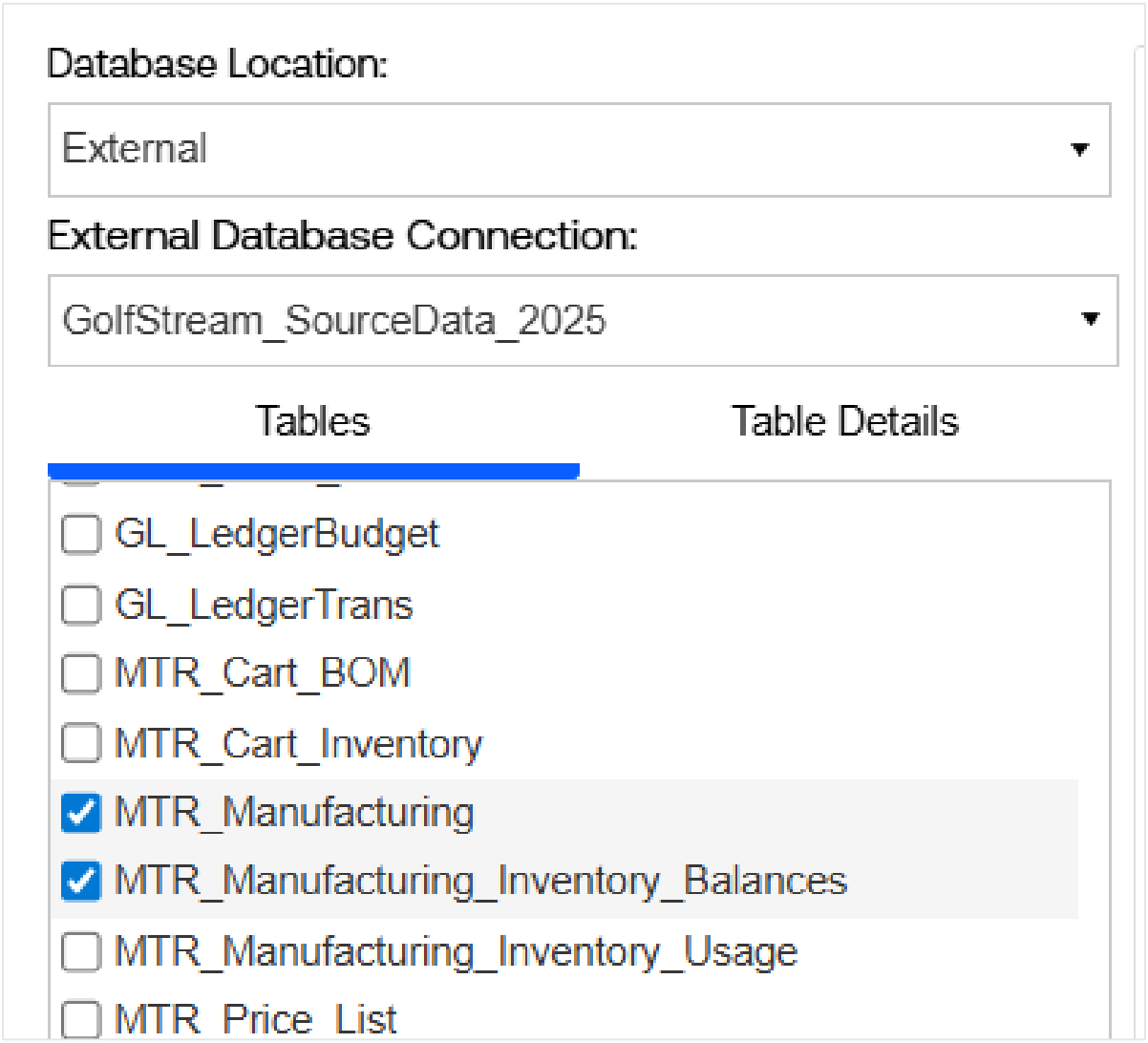
Click Save to generate the Data Adapter.

SQL Query
This is a custom SQL query that behaves like a SQL Data Adapter where you can query internal or external data. Upon saving your query, the system dynamically creates a SQL Data Adapter. This eliminates the need for a pre-existing Data Adapter.

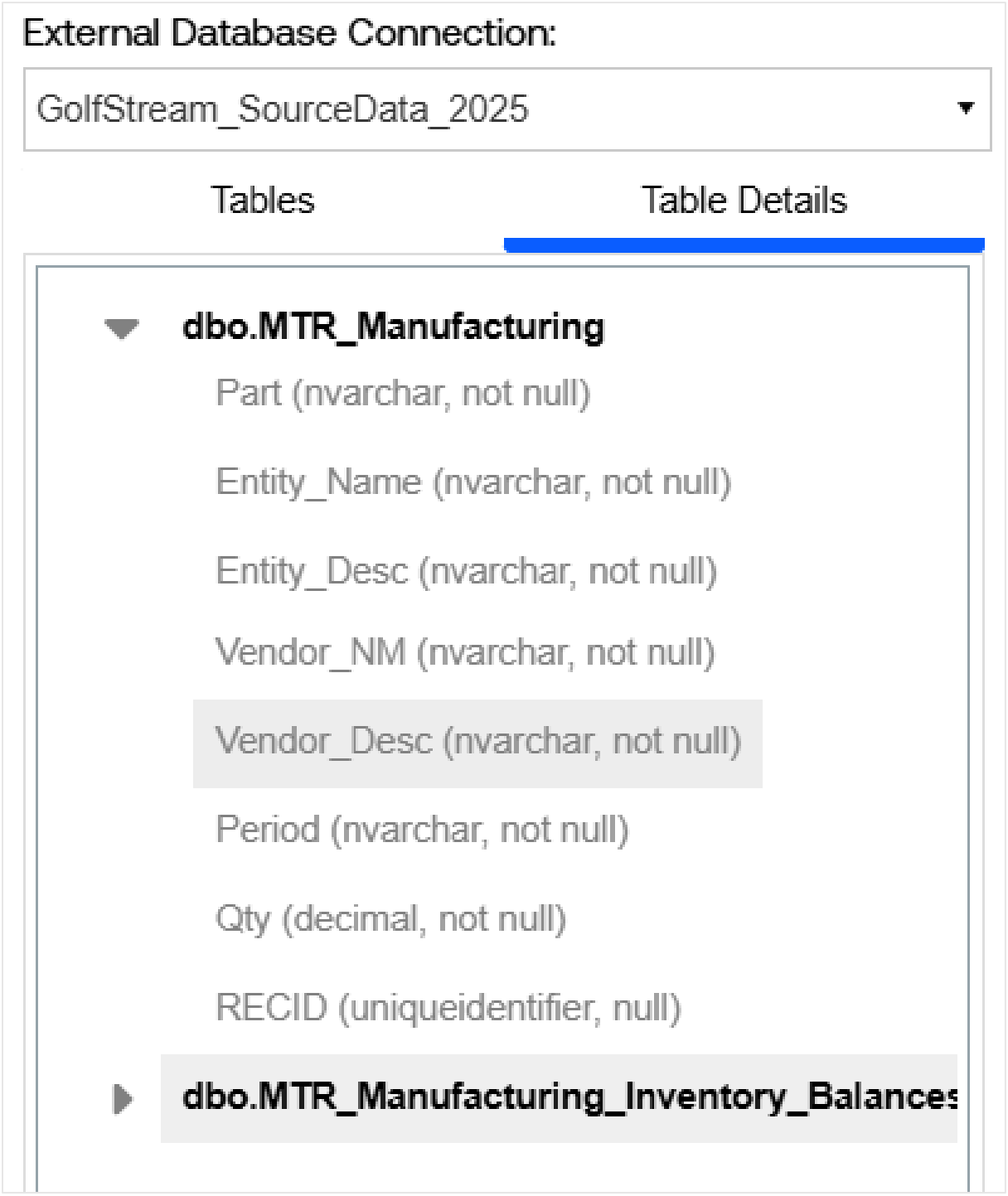
Select your database location. If it's external, you will then select the External Database Connection.

NOTE: External database connections must be configured before you can use this data source option. You cannot create external database connections from the block.

Table Details
This is a read-only resource section that provides the data table details you need for you query. After selecting the database location/connection, the respective database tables will display.



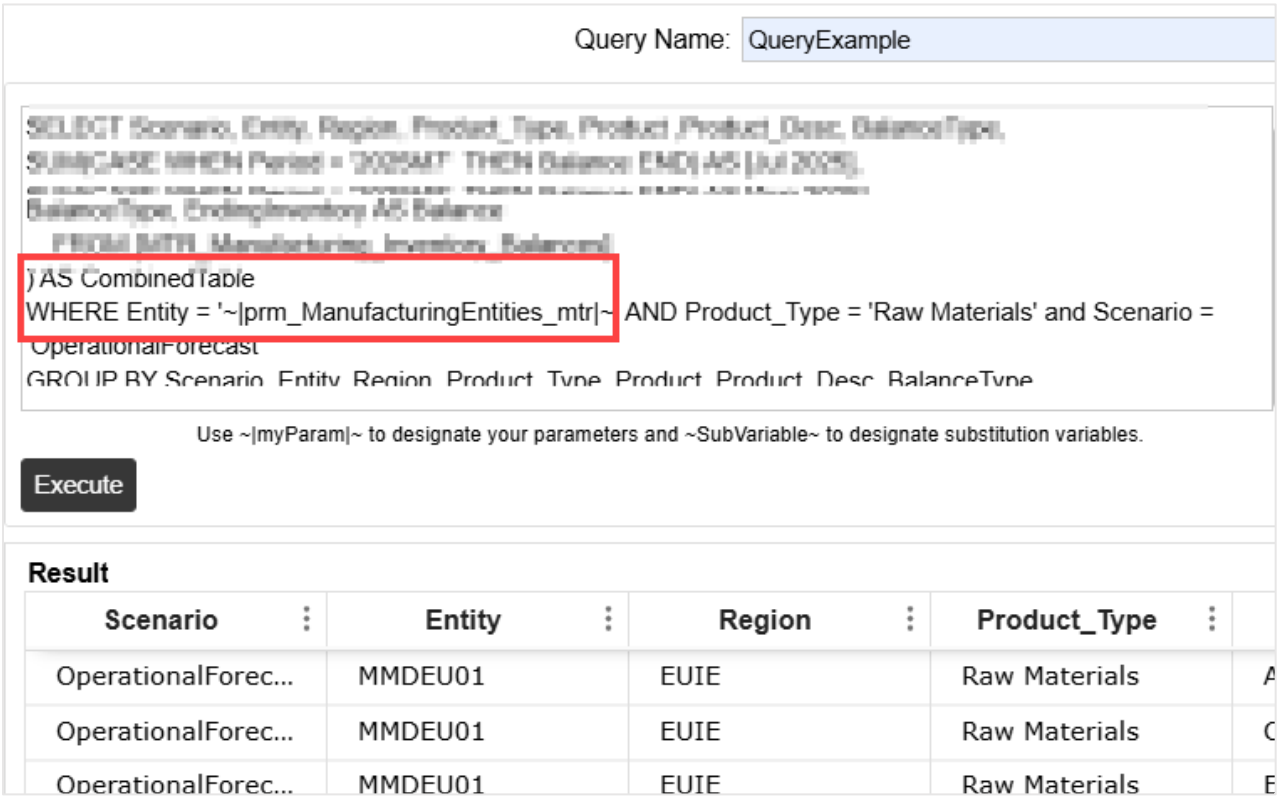
Select tables and click on the Table Details Tab to see the table columns:



Note: This is used for reference only and has no impact on the SQL Query.

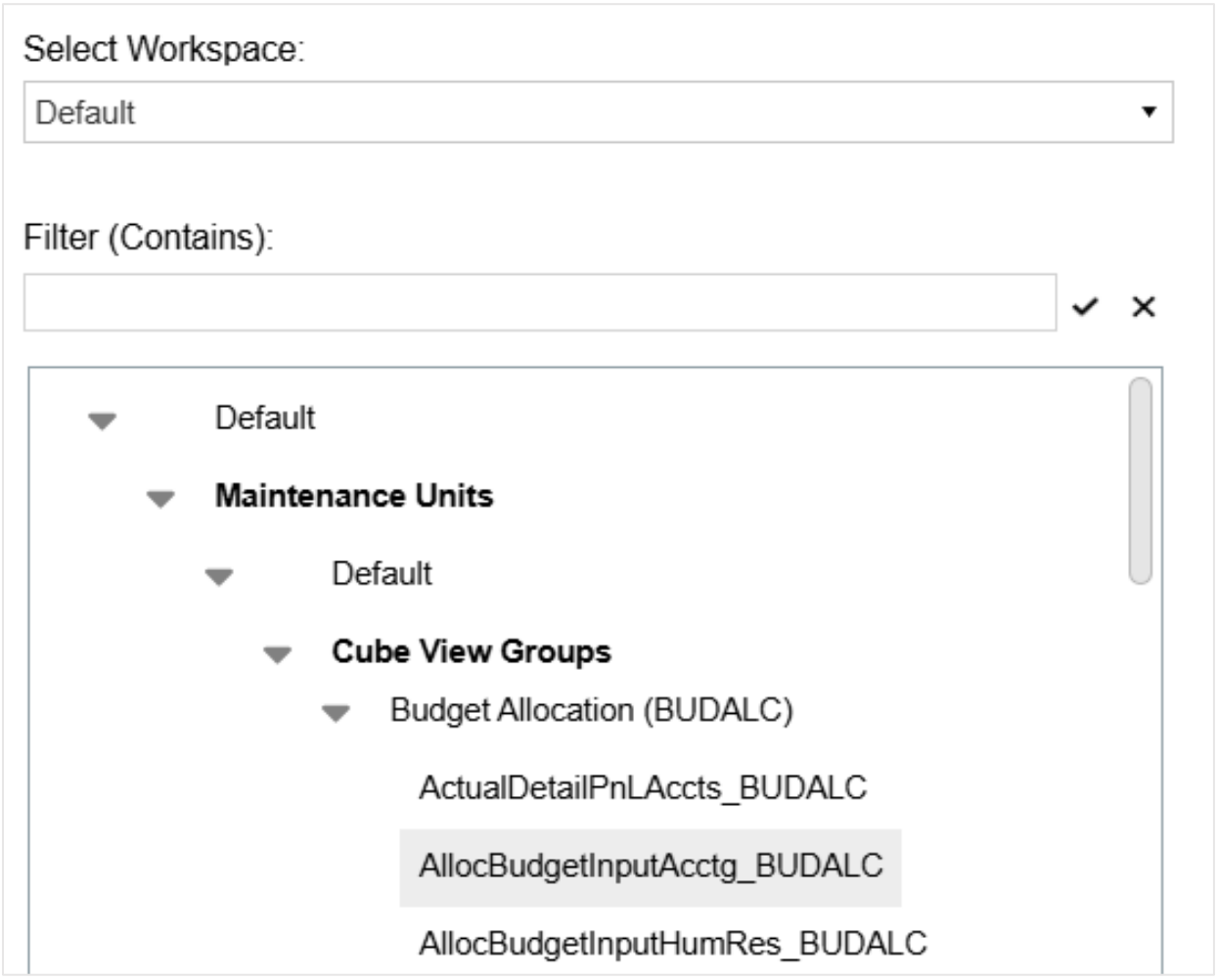
Query

Enter your query and click the Execute button to see a preview. Update the query and re-execute if needed. Click Save to generate the Data Adapter.



NOTE: You can use standard OneStream Parameters in your query such as a Member List or Bound List or standard OneStream Substitution Variables such as |WFTime| or |WFScenario|.
The syntax must be as follows:
Parameter Syntax: ~|myParam|~
Substitution Variable Syntax: ~mySubVar~

Cube View
This allows you to assign a pre-existing Cube View stored in the Application Workspaces page. Click save and the system dynamically creates a Cube View MD Data Adapter.



Spreadsheet

This allows you to use a custom data set from an Excel file. The Spreadsheet Data Source only supports raw data containing simple columns and rows. The first row of the file is automatically recognized as the header row. Headers cannot contain spaces or special characters.

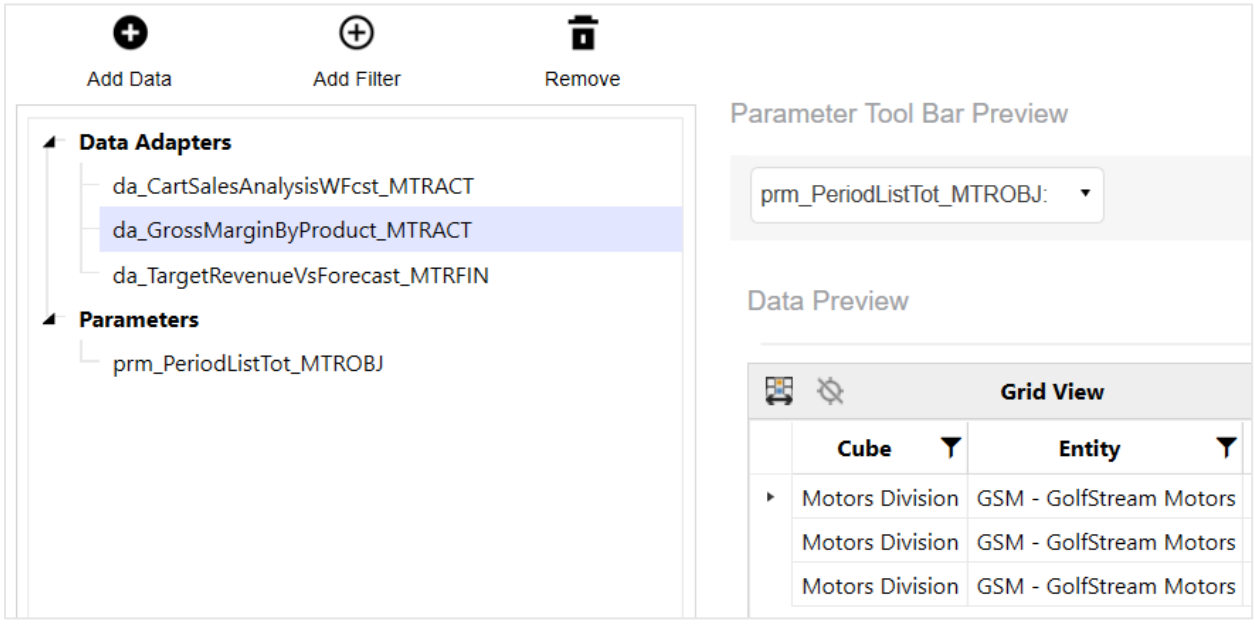
It does not support:

- Files using XF Retrieve Functions (e.g., XFGetCell)
- Import files using Dimension Tokens/Named Ranges
- Files containing Cube View or Quick View data

	A	B	C	D
1	Amount	Entity	Product	SKUDetail
2	-169.49	EUS01	HY-XF	I1-H200-SG7935-4569
3	-369.24	EUS01	IR-LT	I1-H200-SG7935-4572
4	-1,775.57	EUS01	IR-SL	I1-H200-SG7935-4575
5	-1,150.08	EUS01	IR-XF	I1-H200-SG7935-4578
6	-24.21	EUS01	P-Boy	I1-H200-SG7935-4581
7	-12.11	EUS01	P-Cho	I1-H200-SG7935-4584
8	-110.06	EUS01	P-Ice	I1-H200-SG7935-4587
9	-60.53	EUS01	P-Soft	I1-H200-SG7935-4590
10	-330.27	EUS01	P-Thnd	I1-H200-SG7935-4593
11	-2,242.37	EUS01	P-UXL	I1-H200-SG7935-4596

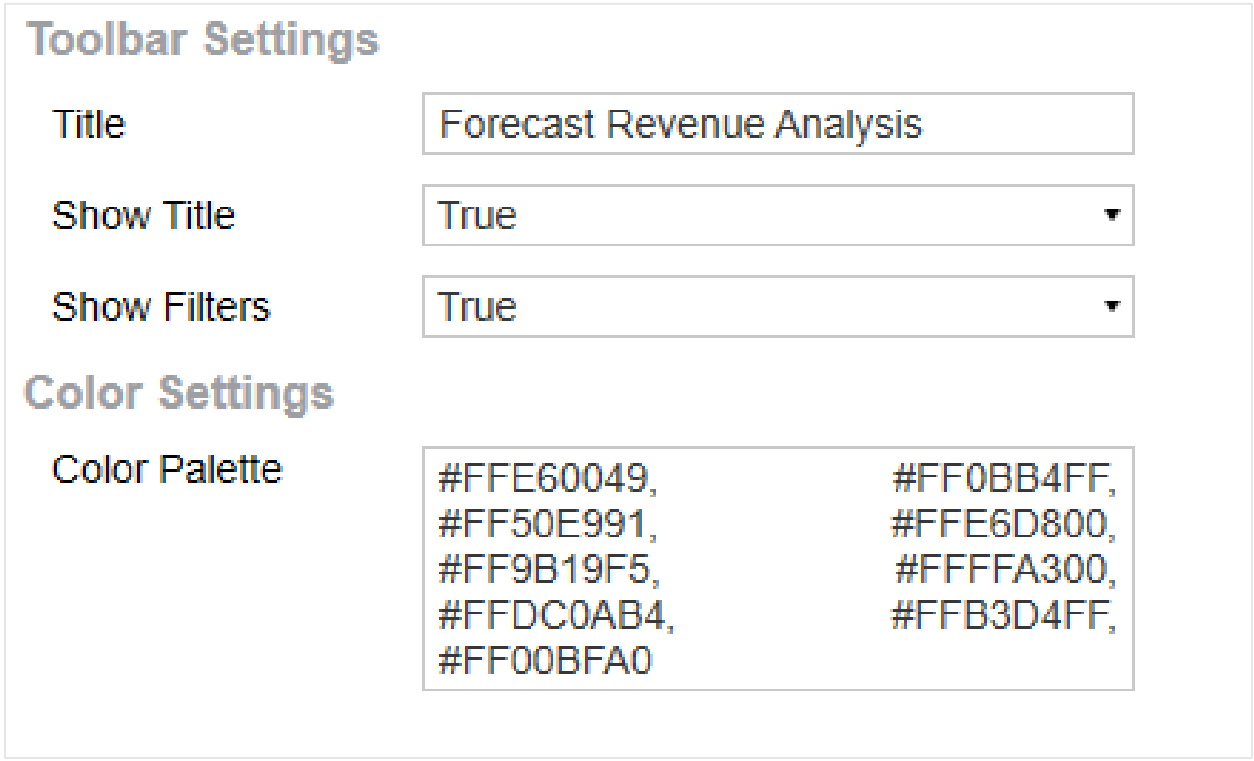
The Excel file must be stored in the File Explorer. Click Save and the system dynamically creates an Excel Data Adapter.

If the Data Source(s) contain Parameters, you will see them listed (excluding Literal Value and Input Parameters). You can also add or remove Parameters. Select a Parameter from the list to update its Parameter Settings if applicable.



Settings

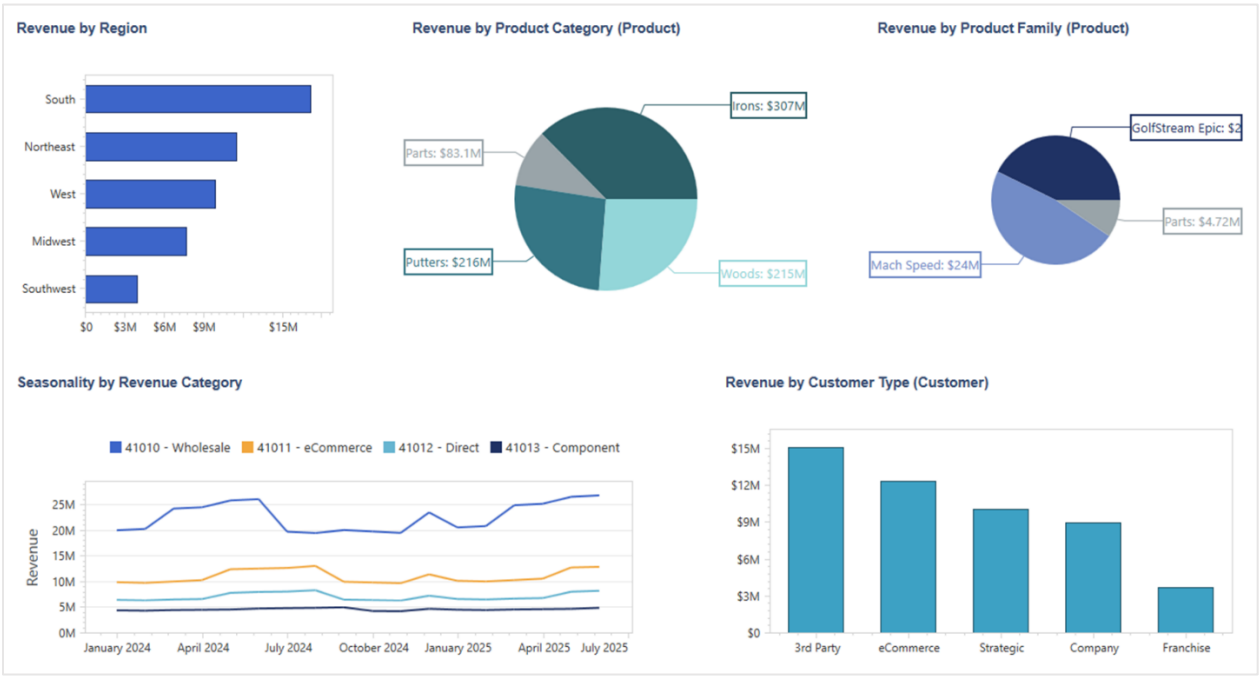
The Settings Tab is where you specify Toolbar settings such as title and color palettes.



Content Page

The content page displays how the user will see it and interact with it. From here, you can launch the BI Viewer Designer and start creating visualizations. This is a good place to test the data set, the filters, etc. to make sure everything was configured as expected.

Note: This block only provides data; this page will be blank until something is built in the BI Viewer Designer. Hover over the page and click edit  to launch the designer.



Appendix 1

Workspace Requirements and Considerations

Workspace objects:

- Data Adapters
- Parameters

Requirements for all Workspaces and objects you intend to use in Genesis:

Requirements	Options
Shareable Workspaces:	Ensure the Is Shareable Workspace setting is set to True on each Workspace; this excludes the Default Workspace.
Share Workspaces with Genesis Workspace:	Locate the Genesis Workspace and ensure each Workspace is assigned to the Shared Workspace Names property.
Object Storage:	Same Shareable Workspace • All objects stored together Default Workspace • All objects stored in the Default Workspace Default/Shareable Workspace • Universal objects such as Parameters stored in Default • Data Adapters stored in separate shareable Workspace

Release Notes

Version 2.0.0

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

Important Notes

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

Enhancements

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

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

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

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

Fixed Issues

- Resolved an issue where the Cube View Query would not display a preview once the query was defined.

Platform and Genesis Compatibility

Genesis Version Requirement

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

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

Minimum Platform Version	9.0.0
Minimum Genesis Version	2.0.0

Content Block Upgrade Path

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

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

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

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

Why is this still required for 2.0?

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

Upgrading from 2.0.0 to Future Versions

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

Refer to the Genesis Guide for more details on the block upgrade process.

Version 1.2.0

The theme of this release is enhanced data source support.

Enhancements

- New Data Source Types
  There are four new Data Source options: Cube Query, SQL Query, Cube View and Spreadsheet.
- Edit Data

Fixed Issues

- Parameter User Prompt Recognition

Version 1.1.0

The theme of this minor release is enhancements and bug fixes.

Enhancements

- BI Viewer Show Title
  The BI Viewer Header automatically adjusts based on the Show Title Toolbar Setting. If Show Title is set to False, all extra space is removed, and the content displays full page.

- BI Viewer Show Filters
  The Refresh Button in the BI Viewer header will only display when Show Filters is set to True. If it is set to False, the button is removed from the header.

Fixed Issues

- Parameter Type Recognition
  When the data adapter, cube view, and parameters were located in separate workspaces, the block failed to recognize the correct parameter types and instead treated them as InputValue type. Now, parameter types are correctly identified and rendered according to their definitions, regardless of workspace separation.

Version 1.0.0

This is the initial release of this block.

Platform and Genesis Compatibility

- Minimum Platform Version: 9.0.0
- Minimum Genesis Version: 1.0.0
- OneStream Browser only; cannot be used in the Windows App