



Data Set Manager Content Block Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

Jump to [Release Notes](#)

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Overview

The Dataset Manager block enables you to manage all aspects of a data adapter. It allows you to view, edit, copy, delete, or preview data adapters. These functions can be performed either within the existing Workspace or in a Workspace separate from the Genesis dashboard.

Note: This specific block is recommended for the True OneStream Administrators only.


Use Cases

- Creation of new Data Adapters
- Editing of Existing Data Adapters
- Deletion of Existing Data Adapters
- Copying of Existing Data Adapters
- Previewing of Existing Data Adapters
- Quick Data Analysis: These can be used to quickly spin up a data adapter for quick data analysis. This can include creating quick comparative data adapters.

Designer Page (Configuration)

The Designer Page allows full administration of the data adapters, which can exist within any Workspace. If the Administrator role is assigned, there is no need to add additional Shared Workspace Names to the Genesis Workspace. However, if this block is to be used outside of the standard out-of-the-box Administrator security role, the Workspaces intended for administering the Data Adapter must have the correct level of security assigned.

Add

Within the Content Page, the user can select the add button  and this will generate a page to “Create a New Adapter”.

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

Input New Data Adapter Name

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

Select Command Type

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

Cube View

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

Cube View MD

The Cube View MD command type will display a 'Select Cube View' style box, similar to the Cube View command. However, it provides functionality nearly identical to a standard Cube View MD data adapter. The Dataset Manager Cube View MD selection does not allow adjustments to, or visibility of, the 'Add Start End Calendar Time' or 'Loop Parameters' options. If needed, these settings can be modified by creating a copy of the data adapter and making the necessary changes on the data adapter component page.

General Settings

Input New Data Adapter Name: NameHere	Select Command Type: Cube View MD
Select Target Workspace: .GenTest	Select Target Maintenance Unit: GenTest

Data Source

Source Type:
Existing Cube View

[Select Cube View](#)

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

[Save](#)

Method

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

The screenshot shows a 'General Settings' dialog box. It is divided into two main sections: 'General Settings' and 'Data Source'.
In the 'General Settings' section, there are four fields:

- 'Input New Data Adapter Name:' with a text box containing 'NameHere'.
- 'Select Target Workspace:' with a dropdown menu showing '_GenTest'.
- 'Select Command Type:' with a dropdown menu showing 'Method'.
- 'Select Target Maintenance Unit:' with a dropdown menu showing 'GenTest'.

A blue 'Save' button is located on the right side of this section.
The 'Data Source' section contains:

- 'Select Method Type:' with a dropdown menu showing 'Business Rule'.
- 'Input Method Query:' with a text box containing the placeholder text: `{MyBusinessRuleName}{MyDataSetName}`
`{Name1=Value1, Name2={Value2}}`

SQL

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

The screenshot shows the 'SQL Query Builder' dialog box. The title bar reads 'SQL Query Builder'. The main area is titled 'SQL Builder (SQLQueryManager)'.
Fields include:

- 'Select Database:' with a dropdown menu showing 'Application'.
- 'Select Table:' with a dropdown menu.
- 'Available Columns:' with a list box showing '(None)'. To its right is a 'Distinct Values:' checkbox.
- 'Select Columns:' with a text box and a right-pointing arrow.
- 'Where (Filter Expressions):' with a text box and a right-pointing arrow.
- 'Group Columns:' with a text box and a right-pointing arrow.
- 'Having (Filter Expressions):' with a text box and a right-pointing arrow.
- 'Order By Columns:' with a text box and a right-pointing arrow.

At the bottom, there are 'Save' and 'Cancel' buttons.

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

BI-Blend

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

The screenshot shows a 'General Settings' form with the following fields:

- Input New Data Adapter Name:** NameHere
- Select Target Workspace:** .GenTest
- Select Command Type:** Bi-Blend
- Select Target Maintenance Unit:** GenTest

Below these fields is a 'Data Source' section containing a disabled 'Select Table Info' button and a 'Save' button.

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

The screenshot shows the 'General Settings' form with updated values:

- Input New Data Adapter Name:** dat_New_BiBAdapter
- Select Target Workspace:** Genesis
- Select Command Type:** Bi-Blend
- Select Target Maintenance Unit:** XCT_Page_DataSetManager_0

The 'Data Source' section now includes an enabled 'Select Table Info' button, and three additional text input fields are visible below it: 'Group By:', 'Data Field Aggregation Types:', and 'Where Clause:'.

Select Target Workspace

This dropdown enables the user to choose the location where the newly created adapter will be saved within a specific Workspace. By default, it will be set to the existing Genesis Workspace.

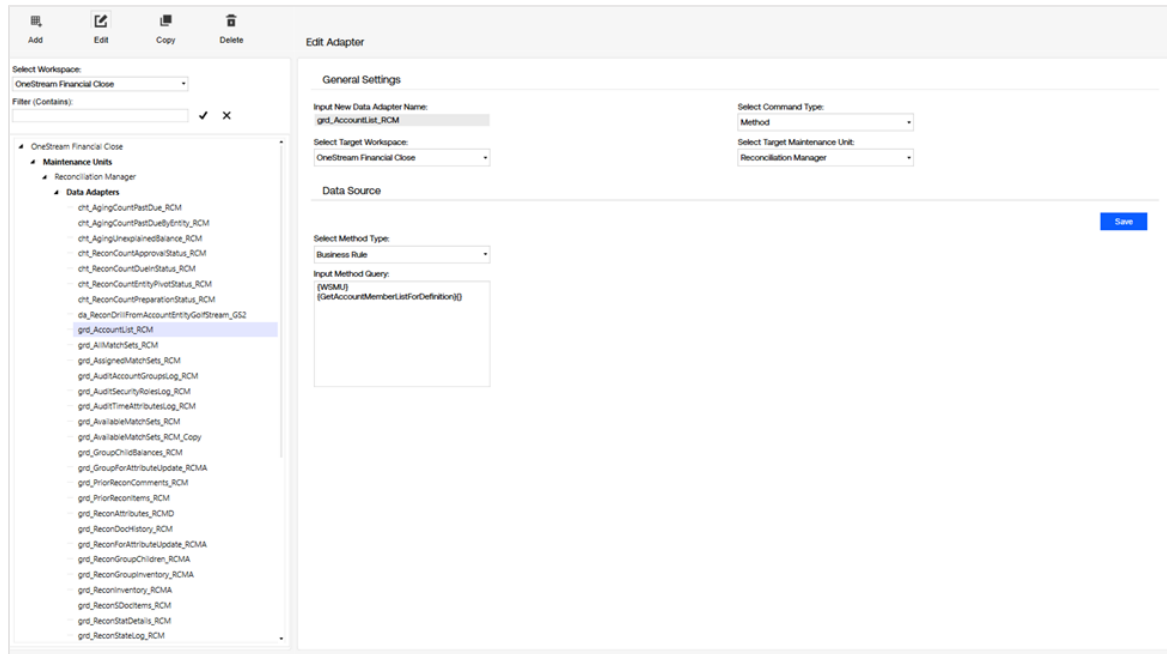
Select Target Maintenance Unit

This dropdown allows the user to select the Maintenance Unit where the created data adapter will be placed within the selected Workspace. By default, it will be set to the existing Genesis Maintenance Unit.

Edit



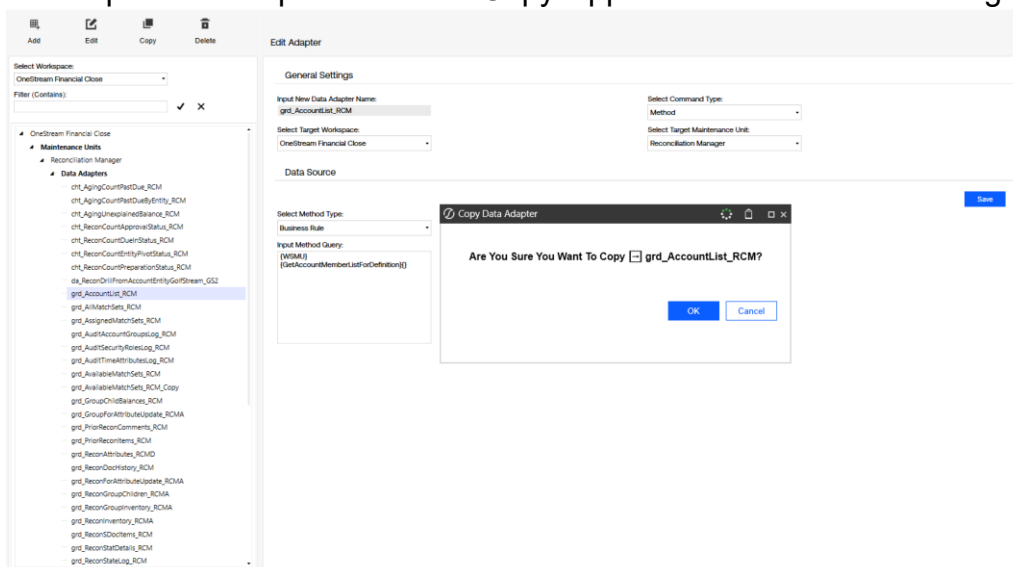
To use the Edit button, a Data Adapter must first be selected from the tree. Clicking the Edit button will display the existing configuration of the selected data adapter, allowing the user to modify it. Clicking Save will apply and store the changes to the data adapter.



Copy




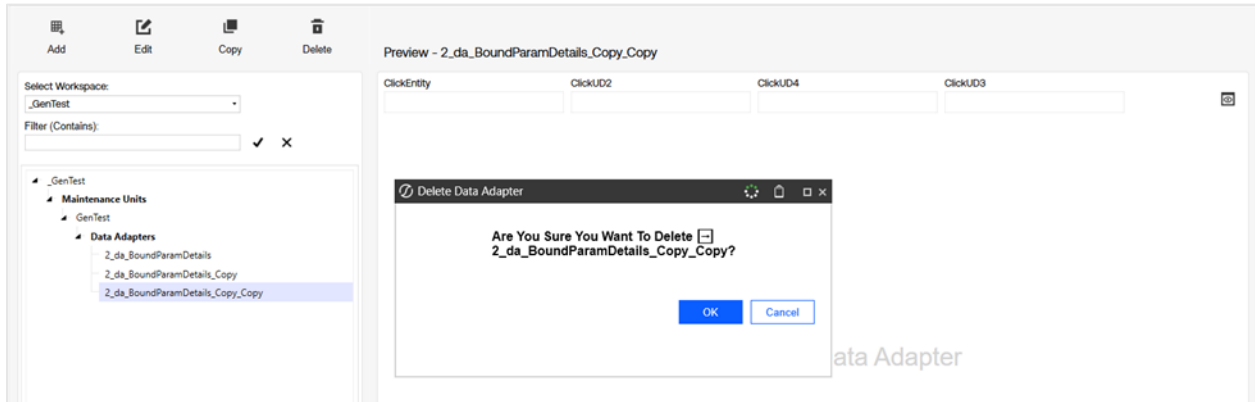
After selecting a specific data adapter in the tree, clicking the Copy button enables the Administrator to duplicate the existing data adapter in the same location. The duplicated adapter will have 'Copy' appended to the end of its original name.



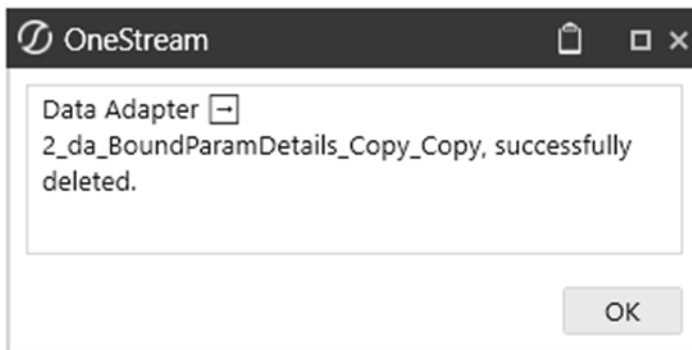
To copy a specific data adapter from one Workspace to a new Workspace, the user must click the Edit button, change the desired location, and then click Save. This action will save the selected data adapter in the new location.

Delete

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



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



Preview



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

Preview - 2_da_BoundParamDetails_Copy

ClickEntity ClickUD2 ClickUD4 ClickUD3

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

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

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

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.

Platform and Genesis Compatibility

Genesis Version Requirement

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

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

Minimum Platform Version	9.0.0
Minimum Genesis Version	2.0.0

Content Block Upgrade Path

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

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

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

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

Why is this still required for 2.0?

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

Upgrading from 2.0.0 to Future Versions

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

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

Version 1.1.0

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

Enhancements

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

Fixed Issues

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

Platform and Genesis Compatibility

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

Version 1.0.0

This is the initial release of the block.

Platform and Genesis Compatibility

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