



KPI Tile 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

Display key performance indicators in a configurable tile format, including the KPI value, optional variance, description, and variance definition. Each tile supports member filters, scenario selection, number formatting, and time period settings. Clicking a KPI opens a detailed Cube View, with several pre-defined views available and the flexibility to add custom views as needed.

Use Cases

- Present key metrics as interactive tiles embedded within a dashboard

Designer Page (Configuration)

After injecting the block, use the Designer page to configure its settings.

The image shows a configuration interface for a KPI tile, divided into three main sections: Member Details, Actions, and Display Formatting. Below these sections is a preview of the KPI value.

- Member Details:** Includes a Member Filter (A#99999), KPI Description (Net income), Compare To (Prior Period), Variance Scenario (Actual), Variance Type (Value), and Variance Behavior ((financial model default)).
- Actions:** Includes Action Type (Open Details Dialog) and Cube View for Details Dialog (Trailing 12 Months vs Pri...).
- Display Formatting:** Includes Number Format (\$0.0m) and Display Order (Value, Description, Variance).

PREVIEW

\$6.7m ▲ \$0.3m
Net income
Jun 2025 vs May 2025

Member Details

This section defines the primary KPI value, and optionally, a value to compare against.

Member Filter

The *Member Filter* specifies which member(s) to use when retrieving the KPI value from the cube. You can:

- Enter manually in the text box.
- Copy from a cell POV.
- Use the Member Filter Builder by clicking the [...] button next to the text box.

You can include parameters, variables, and time functions in the filter. When using parameters, follow the Genesis syntax:

Type	Platform Syntax	Genesis Syntax
Parameter	!MyParam!	~ MyParam ~
Variable	Var	~SubVar~

For dimensions not specified in the member filter:

- Time dimension: the global time POV member is used.
- All other dimensions: the user POV is used.

Example of a valid Member Filter:

```
Cb#[Equipment]:E#~|Param_Entity|~:P#?:C#USD:S#Actual:T#POV:V#Periodic
:A#99999:F#FLWTop:0#Top:I#Top:U1#CCTop:U2#REGTop:U3#PRDTop:U4#CSTTop:
U5#UD5Top:U6#Acquisition:U7#UD7Top:U8#RPTTop)
```

KPI Description

This text will appear directly below the KPI value on the tile. If left blank, the system automatically uses the default description for the Account specified in the member filter.

KPI Description:

Net income

Compare To

Defines the time period used for variance calculation. Options include:

- Prior Year – Compares against the same period in the previous year.
- Prior Period – Compares against the immediately preceding period.
- Same Period – Compares against the same period as the KPI value.
- None – No variance is calculated or displayed.

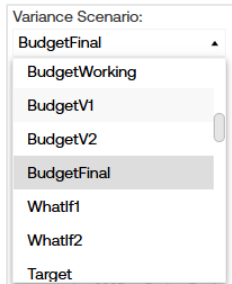
Compare To:

Same Period ▲

- Prior Year
- Prior Period
- Same Period
- None

Variance Scenario

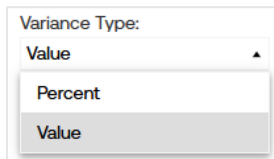
Specifies the Scenario member used for variance calculation. Use the combo box to select any base Scenario member.



Variance Type

Determines how the variance is displayed:

- Value – Shows the variance as a numeric value using the KPI's number format.
- Percent – Shows the variance as a percentage.



Variance Behavior

Controls how variance is calculated and how colors and icons indicate better/worse performance:

- **Financial Model Default**
Uses the Account member's Account Type setting for variance logic.
Example: For a Revenue account, if the KPI value is higher than the comparison value, the variance displays in green with an up arrow:
\$41.2m ▲ 3.6%
- **More is Better**
Always displays KPI value and variance in green, even if Account Type would normally treat an increase as negative (e.g., Expenses).
- **Reverse Sign – More is Better**
Reverses the sign of the calculated variance. Displays in green with a down arrow if the variance is negative:
23.5 ▼ -2.1

- Reverse Sign – More is Worse**
 Reverses the sign of the calculated variance. Displays in red with an up arrow if the variance is positive:
23.5 ▲ 2.1

Actions

This section defines what happens when a user clicks on the KPI value.

Action Type

There are five options for Action Type:

- Navigate to Dashboard**
 Redirects the user to the specified dashboard. Supports passing parameters on click using Name-Value pairs.

Syntax for Name-Value pairs:

```
Param_Entity = E0123, Param_CC = CC0012
```

- Open Dashboard in Dialog**
 Opens the specified dashboard inside a dialog. Supports passing parameters on click using Name-Value pairs.

Syntax for Name-Value pairs:

```
Param_Entity = E0123, Param_CC = CC0012
```

- Open Details Dialog**
 Opens the specified cube view in a dialog. You can choose from one of the available pre-built cube views.

Example:

If the “Account Tree vs Compare Scenario” cube view is selected, the dialog displays the following:

The screenshot shows a dialog window titled 'XLI_D_KPI_1_Details' with a green KPI value of '\$74.0m ▲ \$0.1m' for 'Net revenue Jun 2025 vs BudgetFinal'. Below it is a table titled 'Account Tree vs Compare Scenario' with columns for Actual, Budget Final, Var, and Var %.

	Actual	Budget Final	Var	Var %
Net revenue	73,990,086.70	73,845,281.39	134,805.32	0.2%
Product revenue	78,672,309.41	78,538,063.19	134,246.22	0.2%
Wholesale	42,833,109.93	42,840,521.09	-7,411.16	0.0%
eCommerce	19,242,544.58	19,149,997.50	92,547.08	0.5%
Direct	10,393,390.65	10,377,810.80	15,579.85	0.2%
Component	6,203,264.26	6,169,733.80	33,530.46	0.5%
Intercompany sales	0.00	0.00		0.0%
Adjustments to revenue	-4,692,222.71	-4,692,781.80	559.09	0.0%
Discounts	-1,616,333.52	-1,624,737.60	8,204.08	0.5%
Returns	-3,075,689.19	-3,068,044.20	-7,644.99	-0.2%

- **Refresh**
Refreshes the specified dashboard. Supports passing parameters on click using Name-Value pairs.

Syntax for Name-Value pairs:

```
Param_Entity = E0123, Param_CC = CC0012
```

- **None**
When None is selected, no action is triggered and the KPI tile remains static.

Display Formatting

Number Formatting

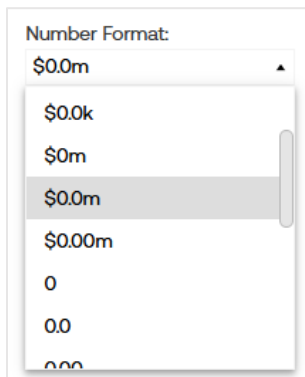
Controls how the KPI value is displayed. Available formats include:

- **Currency** (e.g., "\$0.00")
- **Non-currency** (e.g., "0.0")
- **Percentage** (e.g., "0.0%")

Each format supports multiple precision levels. For currency and non-currency formats, you can also choose display options such as:

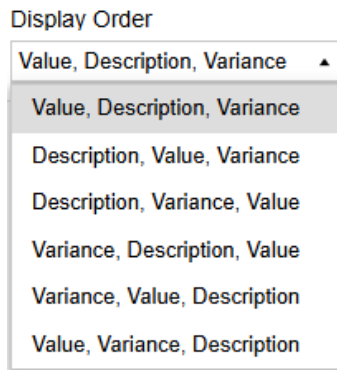
- **Whole numbers**
- **Thousands** (e.g., "0.0k")
- **Millions** (e.g., "\$0.000m")

Note: The currency symbol reflects the actual currency of the cell selected in the KPI.




Display Order

Select the sequence in which the Value, Description, and Variance elements appear on the KPI tile.



Advanced Formatting

For more complex display customization, click the formatting options button . This opens advanced settings where you can override the KPI formatting using formatting strings.

- Tooltips are available in these text boxes to provide examples and guidance.
- **Note:** Color changes for the value text box are not supported.

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 built in Cube Views were duplicating in the tile settings.

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 1.3.0

This release focuses on fixing reported issues and enhancing the block's overall usability.

Fixed

- **Parameter Behavior:**
 - Resolved an issue where Parameters were not working correctly in the Member Script.
 - Resolved an issue where the Parameter would prompt the user when rendering the Dashboard or anytime the Dashboard would refresh. It now uses the designated filter and does not prompt the user.
- Resolved an issue with the detail reports where they were not displaying accurate data as it related to the KPI Member script.
- Resolved an issue with the Scenario Member as it relates to the KPI Tile's Member script. If the Scenario Member is not included in the Member Script, it now defaults to the Application's Global Scenario.

Version 1.2.0

This release focuses on enhancing the drill down capabilities of the tile.

Enhancements

- **Dashboard Dialog Open and Navigation**

You can now drill into Dashboards from the KPI Tile for additional detail. This new option allows you to either navigate to the Dashboard or open it in a new dialog.

Platform and Genesis Compatibility

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

Version 1.1.0

This release focuses on adding more flexibility to how you query data for the tile.

Enhancements

- **Parameter and Substitution Variable Support**
You can now use Parameters and/or Substitution Variables in the Member Script when querying data for the tile. This allows you to keep the data dynamic and in-sync with other objects on the page.

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 this block.

Platform and Genesis Compatibility

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