



SensibleAI Clustering Analysis Release Notes

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SensibleAI Clustering Analysis

Release PV9.3.0 SV1.0.0

This is the initial release of SensibleAI Clustering Analysis.

Highlights

Clustering Project Workspace

- The Clustering Project Workspace is the home page of SensibleAI Clustering Analysis, enabling users to create new clustering projects, return to existing ones, and access both the Configuration and Utilization sections per project.
- Creating a new project walks the user through Project Information, Data Source selection (MetaFileSystem, SQL Server, or other supported sources), and Column Configuration including Data Date, Clustering Dimensions, Feature Columns, Measure Columns, optional Clustering Scopes, and optional Email Column.
- This supports multiple concurrent clustering projects within the same OneStream application.

Configuration Section

- Configuration is divided into a three-step process: Model, Clusters, and Deploy,
- The Model step accepts optional industry, entity-type, and behavioral context for the clustering project. Advanced Configuration is available for clustering algorithm tuning.
- Running the Model Arena iterates across cutting-edge clustering algorithms and selects the best fit for the source data. Progress and results are accessible from the Clusters tab.
- The Clusters tab provides four analysis pages: Overview (cluster count, entity distribution, and AI-generated cluster labels), AI Insights (cluster descriptions and feature importance), Feature Analysis (feature value distributions per cluster), and Cluster Membership (raw data view filterable by cluster and measure or feature).
- The Deploy page locks the clustering configuration as final for the project, enabling downstream workflows to be built and executed.

Utilization Section

- Utilization is the day-to-day surface where end users execute and review workflow outputs.
- Includes Performance Scoring, Workflow Builder, Ranking Analysis (Rankings and Average Analysis pages), Cluster Membership, and a Workflows section listing all configured workflows for the project.
- The Ranking Analysis page provides a static ranking view and an interactive bar chart for analyzing entities or groupings outside a workflow framework.

Performance Scoring

- Composite KPI configuration used to rank entities within and across clusters.
- Supports weighted combinations of measures with explicit direction (higher or lower is better). Total weight is constrained to 100.
- Live Score Preview shows top and bottom performers as measures, weights, and directions are adjusted.
- Performance Score configuration is locked once referenced by a workflow run. A new score can be configured for new analyses without affecting historical results.

Workflow Builder

- Single configuration surface for creating Drift Analysis, Peer Group Analytics, and Benchmarking workflows.
- All workflows share common configuration of name, optional description, and Performance Score selection.
- Drift Analysis configuration accepts Earliest Prediction and Latest Prediction data dates to bound the comparison window.
- Peer Group Analytics configuration accepts alternative grouping dimensions and the set of measures to display on resulting score cards.
- Benchmarking configuration accepts a target plan level (Mean, Median, First Quartile, or Third Quartile), a OneStream cube reference, scenario type, account selection, and the corresponding measure column.

Drift Analytics Workflow

- Surfaces movement of entities between clusters over time and classifies each drift pattern as positive or negative based on the Performance Score of the source and destination clusters.
- Drift Overview page walks users through Insights, Member Drift, and Drift Insights for each pattern.
- Drift Actions page identifies entities currently close to experiencing a saved drift pattern, supporting proactive intervention.
- Drift History page tracks previously flagged candidates and records whether they eventually experienced the predicted drift.

Benchmarking Workflow

- Compares each entity's accounts against the top quartile of its peer group and produces an account-by-account opportunity report.
- Benchmarking Workflow page steps through Cluster Analysis, Budget Plan, and Proposed Budget for each selected account.
- Spend/Revenue Plan page summarizes savings opportunities by account and by entity.
- Execution Plan page guides users from budget plan to actionable insights, including AI-generated explanations of top opportunities for individual entities.

Peer Group Analytics Workflow

- Generates a scorecard for an individual entity relative to its peer group on a configured set of measures.
- Peer Group Analytics Workflow page steps through Rankings, Peer Groups, and Scorecard views for each entity.
- Score Cards page consolidates all entity scorecards for a single review, with sorting and filtering options.
- Execution Plan page converts scorecard insights into action items, suitable for use in MBR and QBR processes.

Compatibility

- Use OneStream Platform Version 9.3.0 or later and Xperiflow Version 4.3.0 or later with this version. OneStream recommends upgrading to the latest platform version.

Documentation

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*.

Contacting Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)