



AI Data Tools Guide

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Overview

This document details the AI Data Tools user interface, including functionality and requirements of each section. Information includes:

- How to interact with each page in the solution.
- How to set permissions restrictions on a per-user basis.
- How to add tabular data types to the environment via the Query Composer page.
- How to query your tabular data types via the Query Composer page.
- How to explore the Meta FileSystem via the File Explorer page.
- How to recount actions performed within AI Data Tools via the Audit Log page.

Query Composer

The first and most significant page of AI Data Tools is the Query Composer page. On this page, users can add tabular data types to various directories. Once added, tables can be queried and altered as needed. Additionally, the Xperiflow engine enables a new routine within the Query Composer page: Natural Language to Query. This routine translates “natural language” text into properly formatted table queries.

File Explorer

The second page of AI Data Tools is the File Explorer page. On this page, users can browse the various folders within the Meta FileSystem. Other OneStream solutions interact with the Meta FileSystem as well, allowing users to inspect their files from within AI Data Tools without any additional actions. Files can also be saved.

Audit Log

The third page of AI Data Tools is the Audit Log page. On this page, users can observe, export and archive a list of all significant actions taken by users within AI Data Tools. The list of audit actions includes: Create Table, Delete Table, Query Table, Alter Table, Build Query from Natural Language, and Change Permissions. Every action logged will also have a status associated with it, either Succeeded, Failed, or Completed With Errors.

Select an Audit Entry to view additional details on the right side of the page. Users are also able to save a copy of the Audit Log to an external location.

Setup and Installation

This section contains details for planning, configuring, and installing the AI Data Tools solution. Before you install the solution, familiarize yourself with these details.

Solution Info

- Solution Version: **DTL-SV1.3.0-XPfv4.3.0-PV9.3.0**
- Xperiflow Version: **4.3.0**

Dependencies

Component	Description
OneStream 9.3.0 or later	Minimum OneStream Platform version required to install this version of AI Data Tools.
Xperiflow 4.3.0 or later	Minimum version required to install this version of AI Data Tools.
Xperiflow Business Rules V230 (XBR)	External API client library to allow AI Data Tools to interface with the Xperiflow Engine. The required version of XBR is packaged with all AI Data Tools versions.

Installation

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.

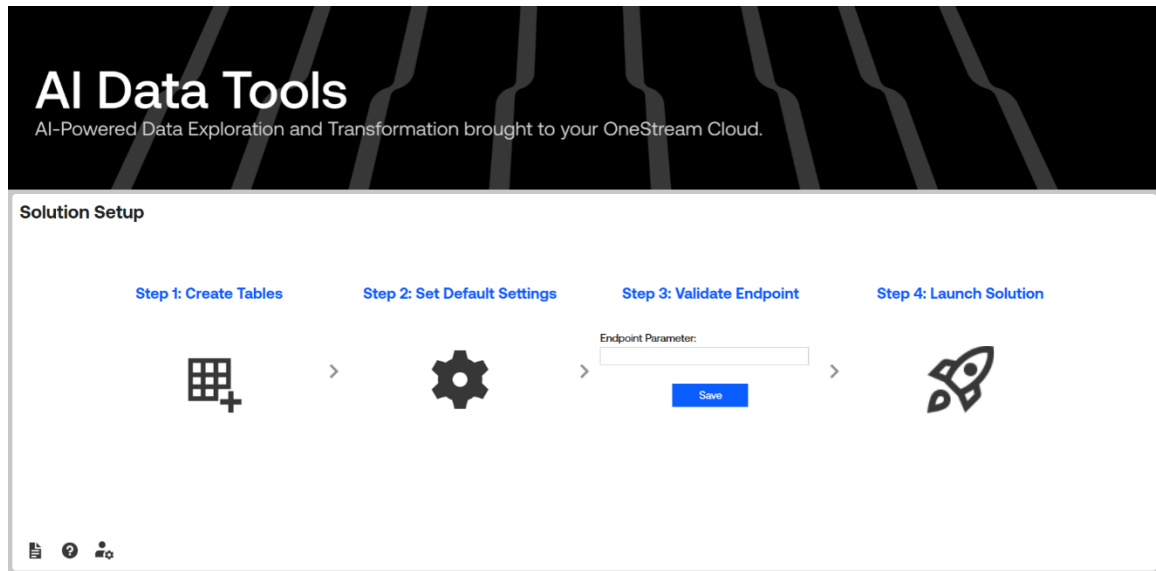
See the *Getting Started with Solutions Guide*.

Set Up AI Data Tools

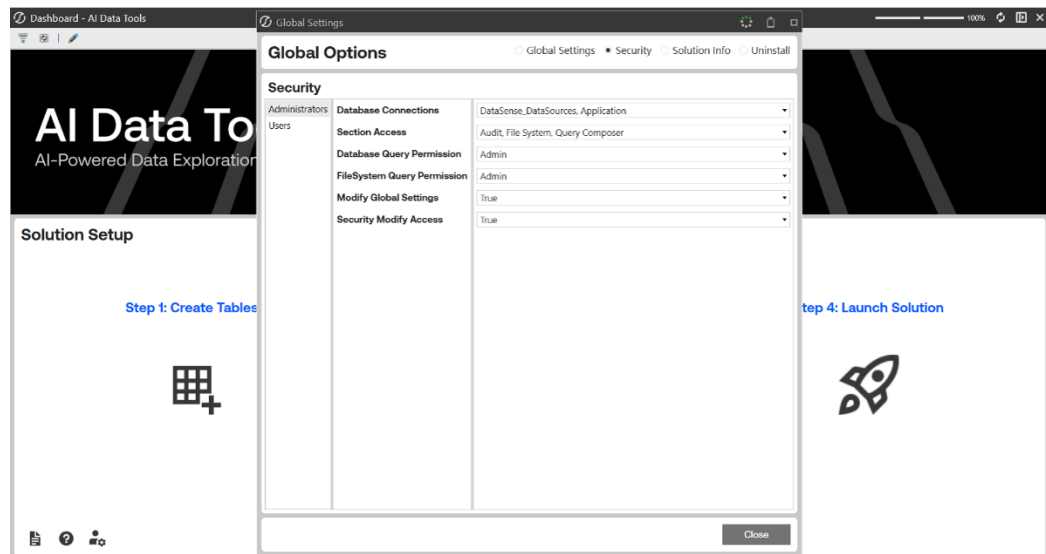
There are multiple steps to set up AI Data Tools:

1. Download the AI Data Tools Solution from the OneStream Solution Exchange.
2. After the OneStream support team ensures that the proper contract is in place, a link is sent to download the AI Data Tools solution. To complete the setup, the user must set the proper endpoint parameter and launch the solution.
3. Follow the outlined Solution Setup steps:

Setup and Installation

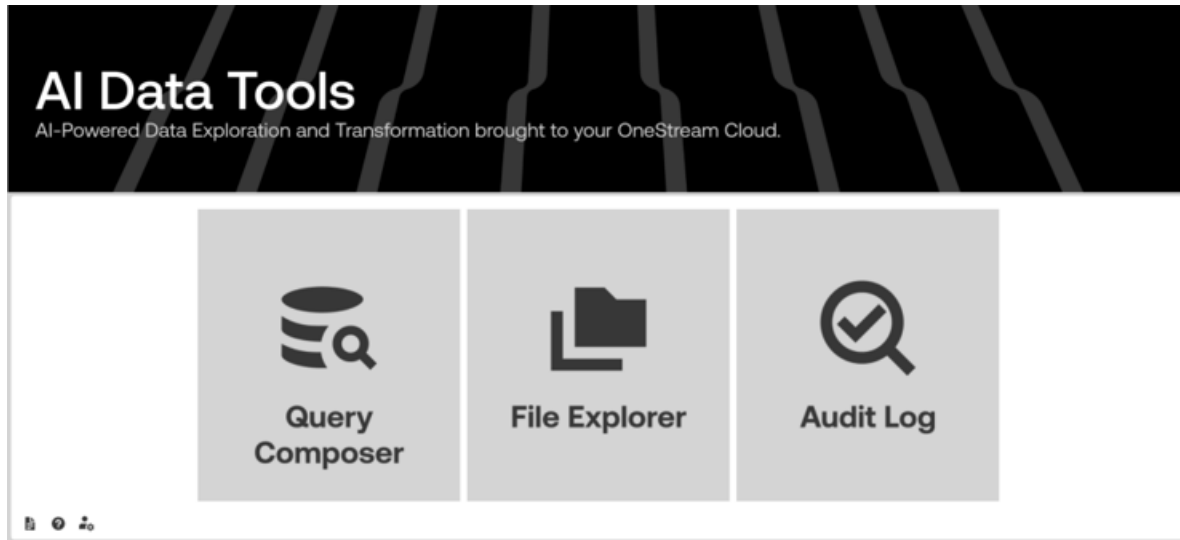


- a. Create Tables
- b. Set Default Settings
 - i. It is advised that when setting up the solution at least one security group is given **Modify Security** access (**True**).



Setup and Installation

- c. Validate Endpoint
 - d. Launch Solution
4. When a user can reach the Home page after clicking Launch, AI Data Tools has been successfully set up correctly:



Settings

To access the Global Settings page, click **Settings**  in the bottom left corner any application page.

Global Settings include:

- [Solution Info](#)
- [Security](#)
- [Uninstall](#)

Solution Info



Solution Version: Displays the current version of AI Data Tools that is installed.

Security

The Security section allows Administrators to configure which databases OneStream Security Groups can use within the application, control access to the various AI Data Tools sections, and permit use of specific query statements. Administrators can also grant other user groups access to be able to modify these security roles.

Steps to Modify Security Roles:

1. Select a security group from the list.
2. Select the type of security permissions to edit:
 - a. Database Connections:
 - i. The databases this user group will have access to within AI Data Tools.

NOTE: The databases visible within this drop-down are determined by your environment's Database Server Connections and their Maintenance Groups. Any user group can be granted access to a database server that has the Maintenance Group **Administrators**. However, a database server with Maintenance Group **Group B** for example is eligible to grant access only to the **Administrators** user group, the **Group B** user group, and any child groups of the aforementioned.

- b. Section Access:
 - i. The sections this user group will have access to within AI Data Tools.
 - c. Database Query Permission:

- i. The query statements this user group will have access to when querying over a database. Options include Read (standard **SELECT** statements), Write (queries that modify an object like **INSERT**, **UPDATE**, **ALTER**, **CREATE**) and Admin (destructive, role-altering, or otherwise unsafe queries like **DROP**, **DELETE**, **TRUNCATE**).
 - d. Filesystem Query Permission:
 - i. The query statements this user group will have access to when querying over the Meta FileSystem. Options include Read, Write, and Admin.
 - e. Modify Global Settings:
 - i. This user group's ability to configure the Xperiflow endpoint value.
 - f. Security Modify Access:
 - i. This user group's ability to configure security roles for their group or other groups.
3. Utilize the combobox to immediately make settings changes.

Settings

Global Settings

Global Options

Global Settings

Security

Solution Info

Uninstall

Security

Administrators

Users

Database Connections

Section Access

Database Query Permission

FileSystem Query Permission

Modify Global Settings

Security Modify Access

DataSense_DataSources, Application

Audit, File System, Query Composer

Admin

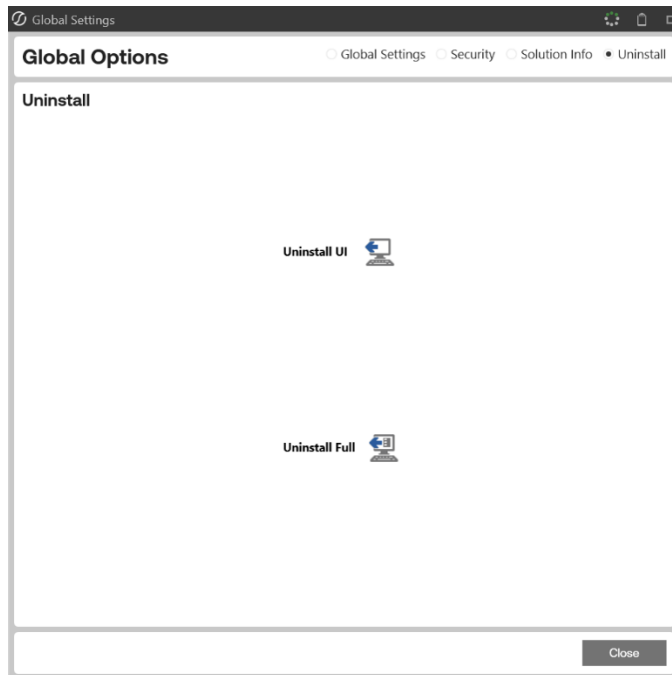
Admin

True

True

Close

Uninstall

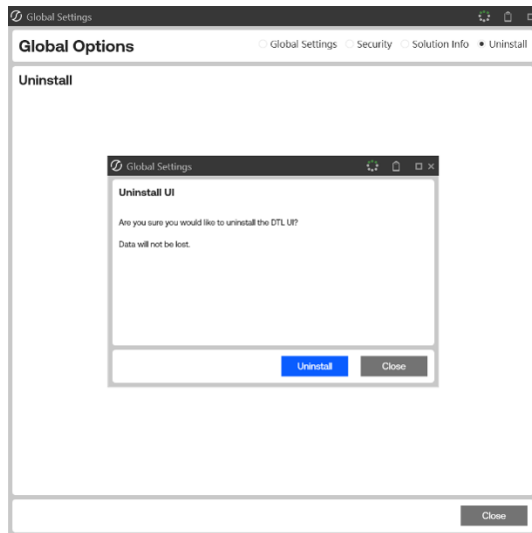


There are two uninstall options:

- **Uninstall UI** removes AI Data Tools, including related dashboards and business rules but leaves the database and related tables in place.

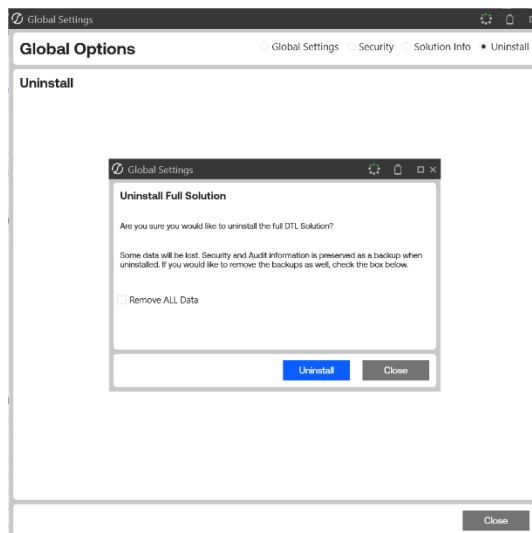
Choose this option if you want to accept an AI Data Tools update without removing data tables.

Settings



- **Uninstall Full** removes most related data tables, along with all data, AI Data Tools dashboards, and business rules. By default, this option creates a Security backup and preserves all Audit information. You have the option to remove this information if you so choose.

Choose this option to completely remove AI Data Tools or to perform an upgrade that is so significant in its changes to the data tables that this method is required.



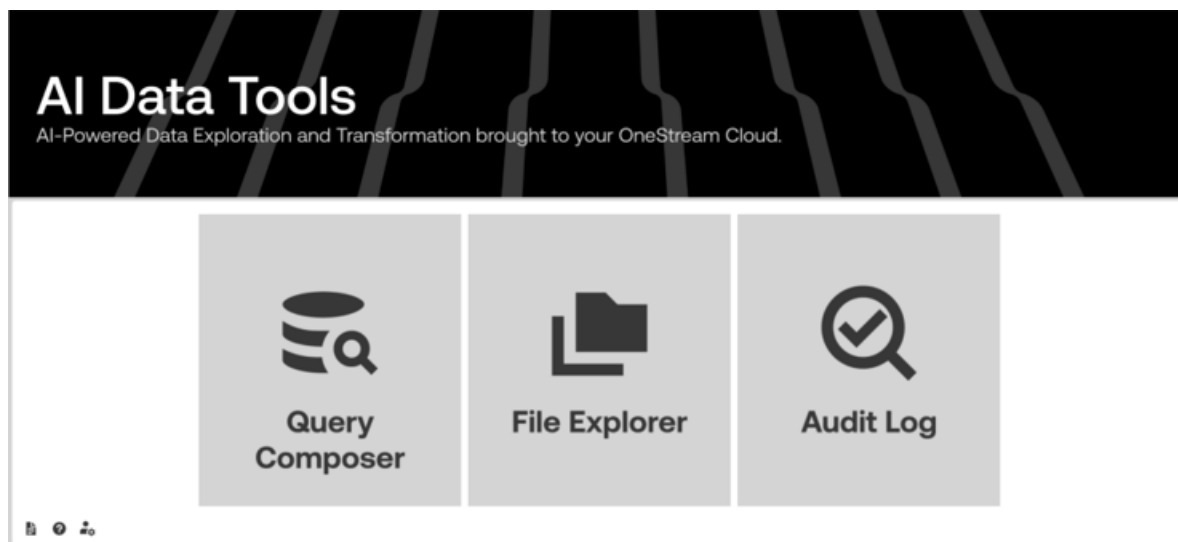
Navigate in AI Data Tools

The following sections describe the ways to navigate in AI Data Tools.

AI Data Tools Home Page

The Home page displays the three different tools available to the user:

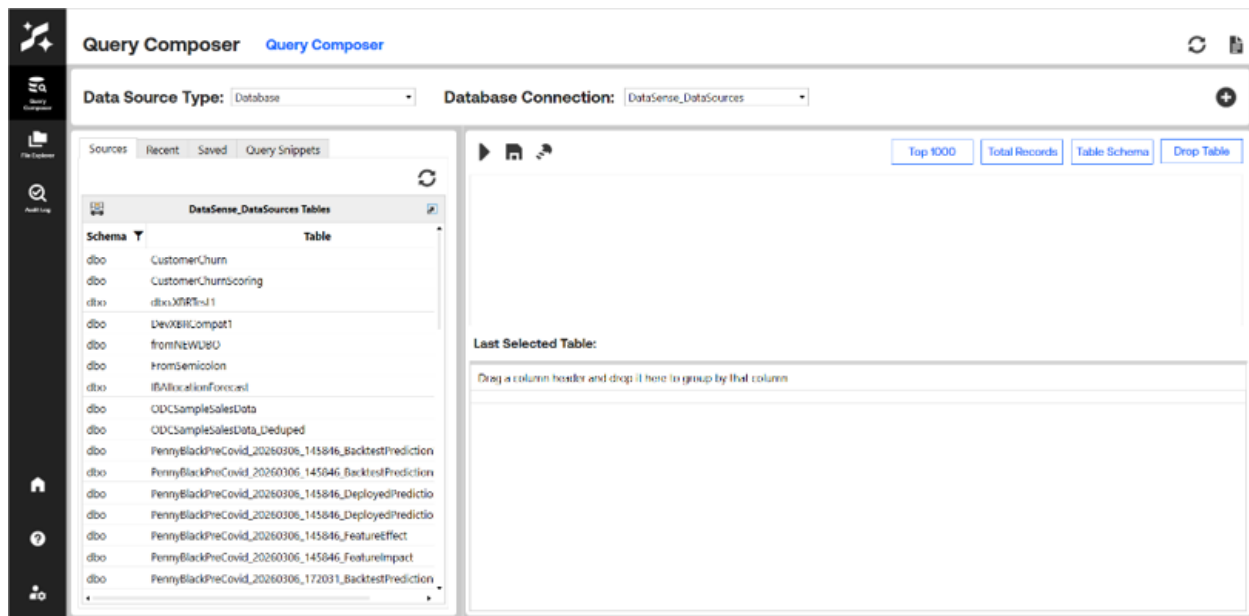
- Query Composer (QC)
- File Explorer (FE)
- Audit Log (AL)



Query Composer (QC) Section

The Query Composer section of the solution allows the user to:

- Write custom queries to pull data directly from a database or the Meta FileSystem.
- Quickly generate queries on the selected table or file using available quick action buttons.
 - **Top 1000:** Get the first 1000 entries from a table or file.
 - **Total Records:** Get the row count of a table or file.
 - **Table Schema:** Get schema information about the table or file.
 - **Drop Table:** Drop the table from the database (SQL-only).
- Convert natural language prompts into SQL or DuckDB queries.



Query Composer Drop-downs, Buttons and Requirements for Use:

Query Composer (QC) Section

The first step that should be taken before using any of the buttons at the top of the screen is to select a table from the grid in the bottom left corner. You will know that a table has been selected if you see the name of it displayed above the text editor:

The screenshot shows the Query Composer (QC) interface. On the left, a sidebar contains a 'DataSense_DataSources Tables' grid. The table 'dbo.ODCSampleSalesData' is selected. The main area displays the 'Data Source Type' as 'Database' and the 'Database Connection' as 'DataSense_DataSources'. A query is shown in the text editor: 'SELECT TOP(1000) * FROM [dbo].[ODCSampleSalesData] WITH (NOLOCK)'. Below the query, the 'Last Selected Table' is 'dbo.ODCSampleSalesData'. A table of data is displayed below the query, with columns: OrderID, OrderDate, CustomerName, CustomerSegment, Region, State, City, ProductCategory, and ProductID. The data is filtered to show the top 1000 records.

OrderID	OrderDate	CustomerName	CustomerSegment	Region	State	City	ProductCategory	ProductID
1001	1/5/2025 12:00:00 AM	Apex Industries	Corporate	East	New York	New York City	Technology	Phor
1002	1/6/2025 12:00:00 AM	Summit Healthcare	Corporate	South	Texas	Houston	Office Supplies	Bind
1003	1/10/2025 12:00:00 AM	Clara Mitchell	Consumer	West	California	Los Angeles	Furniture	Chai
1004	1/12/2025 12:00:00 AM	Redwood Consulting	Corporate	West	Washington	Seattle	Technology	Acce
1005	1/15/2025 12:00:00 AM	Maria Gonzalez	Consumer	South	Florida	Miami	Office Supplies	Pape
1006	1/18/2025 12:00:00 AM	TechVentures LLC	Home Office	East	Massachusetts	Boston	Technology	Laph
1007	1/20/2025 12:00:00 AM	Greenfield Schools	Corporate	Central	Illinois	Chicago	Office Supplies	Stori
1008	1/22/2025 12:00:00 AM	David Park	Consumer	East	New York	Buffalo	Furniture	Table
1009	1/25/2025 12:00:00 AM	Leisureview Partners	Corporate	Central	Ohio	Cleveland	Technology	Phor

Drop-downs

- **Data Source Type**
 - Select the type of source on which to query.
 - Options: Database, Meta FileSystem.
- **Database Connection**
 - Select the database on which to query.
 - Options: All available databases.

Query Composer (QC) Section

- **Metadata Connection Key**

- Select the Meta FileSystem folder on which to query.
- Options: Routine, Shared.

Buttons

- **Run Query**

- Execute the current query against the selected database or Meta FileSystem folder.

- **Save Query**

- Save the current query with a custom name.

- **Agent Mode**

- Open an IDE-like Agent window, supply a prompt and run a query-building assistance routine powered by Xperiflow.

- **Top 1000**

- Select the first 1000 rows from the selected table or file to display in the bottom grid.

- **Total Records**

- Retrieves the total row count from the selected table or file to display in the bottom grid.

- **Table Schema**

Query Composer (QC) Section

- Retrieves the column schema of the selected table or file to display in the bottom grid.

- **Drop Table**

- Opens a dialog and allows the user to drop the currently selected table
 - Database source-only

Other Features:

- **ETL File Create**

- Use the ETL Dialog to add new tables and files to your databases or the Meta FileSystem. Utilize AI Data Tools to perform an initial exploration of your data and transform it how you see fit.

- **Query Snippets**

- Prebuilt templated queries to help the user execute more complex database operations with ease.

NOTE: User must replace table names, column names, and data types in queries before executing. Future releases of AI Data Tools will attempt to further enhance this feature.

- **Natural Language to Query**

- Utilizes the Xperiflow engine to convert a natural language prompt into a valid SQL or DuckDB query.
 - Context must be provided to the routine by selecting one or many tables or files from a context drop-down.

- **Edit Table or File**

Query Composer (QC) Section

- Alter the selected table or file by modifying its name or its column types.
 - Column type changes are not yet available for files.
- Delete the selected table or file.

Natural Language Routine

The Natural Language Routine becomes available through a Show AI Agent button.

The screenshot displays the Query Composer interface. On the left, a sidebar contains icons for 'Query Composer', 'File Explorer', and 'Query Log'. The main area is divided into two sections. The top section, 'Data Source Type: Database', shows a list of tables under the 'DataSense_DataSources Tables' schema. The bottom section, 'Natural Language Routine', features a text input field for a query prompt, a 'Show AI Agent' button, and a 'Context' dropdown menu. Below the input field, a table of data is displayed, showing columns for OrderID, OrderDate, CustomerName, CustomerSegment, Region, State, City, ProductCategory, and Product.

OrderID	OrderDate	CustomerName	CustomerSegment	Region	State	City	ProductCategory	Product
1001	1/5/2025 12:00:00 AM	Apex Industries	Corporate	East	New York	New York City	Technology	Phor
1002	1/8/2025 12:00:00 AM	Summit Healthcare	Corporate	South	Texas	Houston	Office Supplies	Bind
1003	1/10/2025 12:00:00 AM	Clara Mitchell	Consumer	West	California	Los Angeles	Furniture	Chai
1004	1/12/2025 12:00:00 AM	Redwood Consulting	Corporate	West	Washington	Seattle	Technology	Acce
1005	1/15/2025 12:00:00 AM	Maria Gonzalez	Consumer	South	Florida	Miami	Office Supplies	Page
1006	1/18/2025 12:00:00 AM	TechVentures LLC	Home Office	East	Massachusetts	Boston	Technology	Lapt
1007	1/20/2025 12:00:00 AM	Greenfield Schools	Corporate	Central	Illinois	Chicago	Office Supplies	Stor
1008	1/22/2025 12:00:00 AM	David Park	Consumer	East	New York	Buffalo	Furniture	Table
1009	1/25/2025 12:00:00 AM	Lakeview Partners	Corporate	Central	Ohio	Cleveland	Technoloav	Phor

A prompt window will appear on the right side. Enter your desired query prompt (not limited to English) and select your table or file context. Context must be selected to submit your prompt.

Query Composer (QC) Section

The Query Composer interface displays a basic SQL query: `SELECT TOP(1000) * FROM [dbo].[ODCSampleSalesData] WITH (NOLOCK)`. The results table shows 10 rows of data with columns: OrderID, OrderDate, CustomerName, CustomerSegment, Region, State, City, ProductCategory, and ProductName.

OrderID	OrderDate	CustomerName	CustomerSegment	Region	State	City	ProductCategory	ProductName
1001	1/5/2025 12:00:00 AM	Apex Industries	Corporate	East	New York	New York City	Technology	Phor
1002	1/8/2025 12:00:00 AM	Summit Healthcare	Corporate	South	Texas	Houston	Office Supplies	Bind
1003	1/10/2025 12:00:00 AM	Clara Mitchell	Consumer	West	California	Los Angeles	Furniture	Chai
1004	1/12/2025 12:00:00 AM	Redwood Consulting	Corporate	West	Washington	Seattle	Technology	Acco
1005	1/15/2025 12:00:00 AM	Maria Gonzalez	Consumer	South	Florida	Miami	Office Supplies	Pape
1006	1/18/2025 12:00:00 AM	TechVentures LLC	Home Office	East	Massachusetts	Boston	Technology	Lapb
1007	1/20/2025 12:00:00 AM	Greenfield Schools	Corporate	Central	Illinois	Chicago	Office Supplies	Stori
1008	1/22/2025 12:00:00 AM	David Park	Consumer	East	New York	Buffalo	Furniture	Tabl
1009	1/25/2025 12:00:00 AM	Lakeview Partners	Corporate	Central	Ohio	Cleveland	Technoloa	Phor

Submitting the prompt will update your query window, which can then be run, saved or modified as desired.

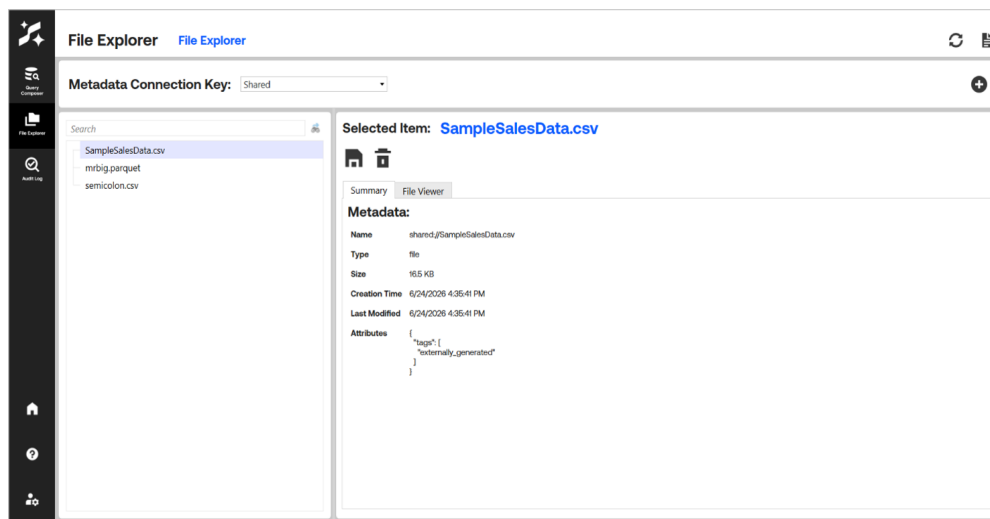
The Query Composer interface displays a refined SQL query: `SELECT TOP 5 [OrderID], [OrderDate], [CustomerName], [Region], [Revenue] FROM [dbo].[ODCSampleSalesData] WHERE [Region] = 'West' ORDER BY [Revenue] DESC`. The results table shows 5 rows of data with columns: OrderID, OrderDate, CustomerName, Region, and Revenue.

OrderID	OrderDate	CustomerName	Region	Revenue
1091	10/1/2025 12:00:00 AM	Quantum Analytics	West	9355.93
1049	5/21/2025 12:00:00 AM	Vertex Software	West	8644.93
1037	4/17/2025 12:00:00 AM	Pacific Biotech	West	4783.96
1069	7/21/2025 12:00:00 AM	Horizon Media	West	4274.95
1101	11/1/2025 12:00:00 AM	Silverlake Ventures	West	3899.97

File Explorer (FE) Section

The File Explorer section of the solution allows the user to:

- Browse the Meta FileSystem, performing various actions.
 - **Add New Folder**
 - **Save**
 - **Delete**
- Preview file contents



File Explorer Drop-downs and Buttons:

Drop-downs

File Explorer (FE) Section

- **Metadata Connection Key**

- Select the Meta FileSystem folder on which to explore
- Options: Routine, Shared

Buttons

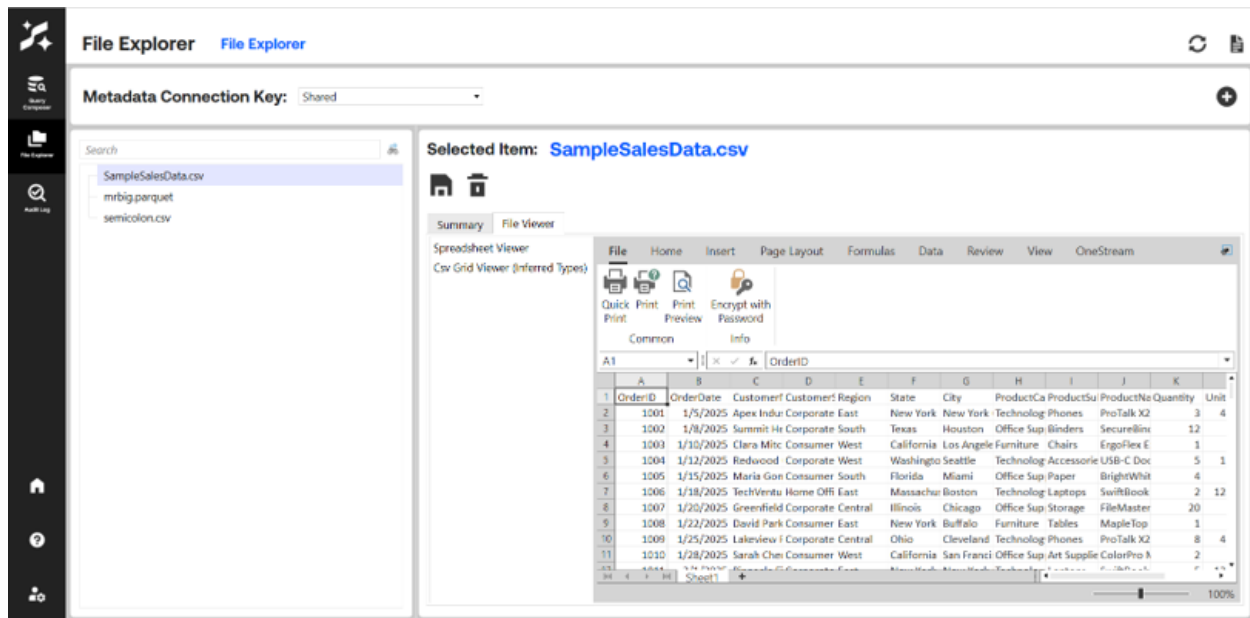
- **Save File**

- Copy the current file and save it to a new location.

- **Delete File**

- Delete the selected file from the Meta FileSystem

Utilize the File Viewer tab to quickly view file contents.



The screenshot shows the File Explorer application interface. On the left, there is a sidebar with navigation icons. The main area is titled "File Explorer" and "File Explorer". Below the title, there is a "Metadata Connection Key:" dropdown menu set to "Shared". A search bar is present, and below it, a list of files is shown: "SampleSalesData.csv", "mrbig.parquet", and "semicolon.csv". The "SampleSalesData.csv" file is selected. To the right of the file list, there is a "Selected Item: SampleSalesData.csv" section. Below this, there are tabs for "Summary" and "File Viewer". The "File Viewer" tab is active, showing a preview of the CSV file. The preview includes a menu bar with "File", "Home", "Insert", "Page Layout", "Formulas", "Data", "Review", "View", and "OneStream". Below the menu bar, there are icons for "Quick Print", "Print", "Preview", and "Encrypt with Password". The main content area of the File Viewer shows a table with columns: "OrderID", "OrderDate", "Customer", "Customer", "Region", "State", "City", "ProductCa", "ProductSu", "ProductNo", "Quantity", and "Unit". The table contains 11 rows of data.

	A	B	C	D	E	F	G	H	I	J	K	L
	OrderID	OrderDate	Customer	Customer	Region	State	City	ProductCa	ProductSu	ProductNo	Quantity	Unit
1	1001	1/5/2025	Apex Indu	Corporate	East	New York	New York	Technolog	Phones	ProTalk X2	3	4
2	1002	1/8/2025	Summit Hi	Corporate	South	Texas	Houston	Office Sup	Blinders	Securelin	12	
3	1003	1/10/2025	Clara Minc	Consumer	West	California	Los Angeles	Furniture	Chairs	ErgoFlex E	1	
4	1004	1/12/2025	Redwood	Corporate	West	Washington	Seattle	Technolog	Accessorie	USB-C Doc	5	1
5	1005	1/15/2025	Maria Gon	Consumer	South	Florida	Miami	Office Sup	Paper	BrightWhit	4	
6	1006	1/18/2025	TechVentur	Home Offi	East	Massachu	Boston	Technolog	Laptops	SwiftBook	2	12
7	1007	1/20/2025	Greenfield	Corporate	Central	Illinois	Chicago	Office Sup	Storage	FileMaster	20	
8	1008	1/22/2025	David Park	Consumer	East	New York	Buffalo	Furniture	Tables	MapleTop	1	
9	1009	1/25/2025	Lakeview I	Corporate	Central	Ohio	Cleveland	Technolog	Phones	ProTalk X2	8	4
10	1010	1/28/2025	Sarah Chen	Consumer	West	California	San Franci	Office Sup	Art Supplie	ColorPro R	2	
11												

Audit Log (AL) Section

The Audit Log section of the solution allows the user to:

- Observe all significant actions taken by users within AI Data Tools. Significant actions include:
 - Creating, deleting, altering or querying a file or table
 - Building a query using the Natural Language routine
 - Modifying AI Data Tools permissions via the Security dialog
- Export or Archive the Audit Log to an external location

The screenshot displays the 'Audit Log' section of the AI Data Tools interface. It features a table with columns for 'Captured Time', 'Action', 'Contents', and 'User'. The table lists various actions such as queries, natural language prompts, and file operations. A 'Details' panel on the right provides a closer look at a specific action, showing the time, user, action type, contents, and status.

Captured Time	Action	Contents	User
6/25/2026 12:50:41 AM	Query	-- Select the 5 largest individual orders from the West region based on Revenue SELECT TOP 5	Adm
6/25/2026 12:50:13 AM	Natural Language	Prompt: What are the 5 largest individual orders from the West? Response: -- Select the 5 largest in	Adm
6/25/2026 12:48:10 AM	Query	SELECT TOP(1000) * FROM [dbo].[ODCSampleSalesData] WITH (NOLOCK)	Adm
6/25/2026 12:44:53 AM	Query	SELECT TOP(1000) * FROM [dbo].[ODCSampleSalesData] WITH (NOLOCK)	Adm
6/25/2026 12:44:51 AM	Query	SELECT TOP(1000) * FROM [dbo].[BAllocationForecast] WITH (NOLOCK)	Adm
6/25/2026 12:07:35 AM	Query	SELECT TOP(1000) * FROM [dbo].[ODCSampleSalesData] WITH (NOLOCK)	Adm
6/24/2026 4:35:42 PM	Create	Created /SampleSalesData.csv in sql-server-shared	Adm
6/3/2026 9:07:30 PM	Query	SELECT * FROM 'shared://mrbig.parquet' LIMIT 1000	Adm
6/3/2026 9:07:23 PM	Query	SELECT * FROM read_csv('shared://semicolon.csv', delim=';', header=true, auto_detect=true) LIMIT 100	Adm
6/3/2026 9:07:15 PM	Query	SELECT premium, pure_premium, risk_premium FROM 'shared://mrbig.parquet' LIMIT 1;	Adm
6/3/2026 9:04:25 PM	Query	SELECT premium, pure_premium, risk_premium FROM 'shared://mrbig.parquet' LIMIT 1;	Adm
6/3/2026 9:04:18 PM	Query	SELECT * FROM 'shared://mrbig.parquet' LIMIT 1	Adm
6/3/2026 9:04:06 PM	Query	SELECT * FROM 'shared://mrbig.parquet' LIMIT 1000	Adm
6/3/2026 9:03:26 PM	Query	SELECT * FROM read_csv('shared://semicolon.csv', delim=';', header=true, auto_detect=true) LIMIT 100	Adm
6/3/2026 9:00:19 PM	Query	SELECT * FROM 'shared://mrbig.parquet' LIMIT 1	Adm
6/3/2026 9:00:11 PM	Query	SELECT * FROM 'shared://mrbig.parquet' LIMIT 1000	Adm
6/3/2026 9:00:05 PM	Query	SELECT * FROM read_csv('shared://semicolon.csv', delim=';', header=true, auto_detect=true) LIMIT 100	Adm

Details

Time: 6/25/2026 12:50:13 AM

User: Administrator

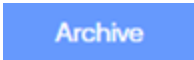
Action: Natural Language

Contents: Prompt: What are the 5 largest individual orders from the West?
Response: -- Select the 5 largest individual orders from the West region based on Revenue
SELECT TOP 5
[OrderID],
[OrderDate],
[CustomerName],
[Region],
[Revenue]
FROM
[dbo].[ODCSampleSalesData]
WHERE
[Region] = 'West'
ORDER BY
[Revenue] DESC;

Status: Succeeded

[Export](#) [Archive](#)

Audit Log Buttons

- **Audit Select**
 - Select an individual entry within the Audit grid to view an external location.
- **Export** 
 - Export all audit entries within the supplied date range to an external location.
- **Archive** 
 - Export all audit entries within the supplied date range to an external location, **removing their existence** from the Audit Log.