onestream

SensibleAI Agents Release Notes

PV9.3.0 SV1.3.0

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SensibleAI Agents Release PV9.3.0 SV1.3.0

The theme for this Minor release is a redesigned Documents Management experience, upgraded AI models across Search and Deep Analysis, and clearer visibility into AI credit usage across SensibleAI Agents.

Highlights

Manage your documents with a redesigned Documents Management solution, upgrade to the GPT-5.6 model family in Search and Deep Analysis, and track AI credit usage with greater accuracy.

Enhancements

Documents

- The redesigned Documents Management solution includes a new Overview landing page plus Clusters, Files, Activity, Connectors, and Personas pages, with a built-in review and approval workflow.
- Approval workflows include owner and admin auto-approval, approval voting, and a scan-bypass review path so approvers can knowingly clear a failed security scan with comments.

- Duplicate file-name detection on upload includes a rename-conflict resolution prompt, and you can edit files in bulk.
- Markdown (.md) support lets you upload and view Markdown files in the app and reference them in Search and Deep Analysis.
- Connectors are in the Documents portal, and administrators manage source configurations in Control Tower.
- Persona management is in a redesigned form under Documents.
- Document uploads and connector syncs now show an estimated credit cost before an upload or sync workflow starts.

Finance Analyst

- Access follows OneStream security roles. Admin activities are governed by the OneStream application roles (AdministerApplication, ViewAllData, ManageMetadata) instead of the OneStream Administrators group alone. In most cases these roles are set to the Administrators access group, and you can update them to give additional groups or users admin capabilities over certain parts of the agents application.
- Finance Analyst identifies when a user has display access but not read access to a dimension member. If a user requests that member, the agent notifies them that they do not have the proper access to pull the stored data.
- Finance Analyst lets you select the None member directly in dynamic reports instead of setting it explicitly in the dimension defaults.
- Finance Analyst MCP connections support Gemini Enterprise Standard and Business accounts, alongside Copilot, Claude, and ChatGPT.

Deep Analysis

- Saved analysis plans detect when the underlying model or data has drifted and warn you, so you know when a saved plan may need to be branched from or updated.
- Internal subsystems of the agent use the GPT-5.6 model family for improved retrieval, answer quality, and intelligence.

Search

- Internal components of the agent use the GPT-5.6 model family for improved quality and intelligence.

AI Credit Usage and Control Tower

- You can export credit history to a CSV file.
- The split-credits action is back.
- Usage and cost tracking is more accurate, including finer accounting of model token usage.
- The Upgrade Portal moves to the top of System and is gated to SAI admins.
- Feature Flags moves to the top of Settings as Application Settings and is gated to SAI admins.

General

- Documents load faster in the Documents experience.
- Environment setup is simplified because the setup password gate has been removed.
- Document uploads, connector syncs, and evaluation runs are charged to a new, company-wide Environment Operations credit quota rather than to individual users' quotas. This quota can be updated in the Credit Limits page.
- Evaluation runs are now environment operations and will no longer count against the quota of the user who started them. Credits previously charged for evaluations are refunded as part of this update.

Fixed Issues

- Finance Analyst report time windows align to your local time zone.

Upgrade Information

Run the environment upgrade and set up Marketplace app updates. See Environment Upgrade in the SensibleAI Agents guide.

Compatibility

- Minimum Platform Version 9.3.0 or later is required. OneStream recommends upgrading to the latest platform version.

Contact Support

Contact OneStream Support by registering at:

Support - OneStream Software

SensibleAI Agents Release PV9.3.0 SV1.2.0

This Minor release introduces Commentary Write-Back and Agent Memory in Finance Analyst, adds Custom MCP Client management to the Integrations page, and includes image inputs, default sets, and usability improvements across the solution across the SensibleAI Agents.

Enhancements

Finance Analyst

- **Commentary Write-Back**: Finance Analyst can propose writing commentary and summaries back into OneStream cube cells. Every proposed write is shown for your review before it's saved. You will see the existing cell value beside the proposed value and can edit, stage, undo, and confirm each change. Writes respect OneStream security, workflow locks, and read-only settings, across all five text-based view members: Annotation, VarianceExplanation, Assumptions, AuditComment, and Footnote. Available for both ad hoc requests in Finance Analyst chat and scheduled Analysis Plans.
- **Agent Memory (Beta)**: Finance Analyst can remember context across conversations, recalling details saved from previous conversations and citing the memories it used. Memories can be reviewed and approved before they are saved and managed from a new Memory page in settings. Memory is currently in beta and accessible behind a feature flag. When activated, you must individually opt in to leverage the memory feature.

- **Default Sets**: Administrators can create reusable sets of dimension defaults and assign them to individual users. This allows administrators to set varying dimension defaults for users within a single persona. Users see their effective defaults under "**My Defaults**."
- **User Configuration Page**: A new page within the Finance Analyst configuration portal allows administrators to set the Default Persona and Default Set for users to leverage. This makes it easier for an admin to pre-configure and manage Finance Analyst for their users.

Integrations

- **Custom MCP Clients**: A new Custom MCP Clients section on the Integrations page lets administrators self-service create their own MCP client connection secrets (the existing list is now "**Supported MCP Clients**").

General

- **Image Inputs**: Image inputs are now supported in Search and Deep Analysis, with automatic content-safety screening applied before an image is used.
- **Message Length Guardrails**: Chat input now enforces a per-agent character limit with a live character count and an inline message, so oversized prompts are caught before sending instead of silently failing.
- **Persona Indicators in Chat Explorer**: A persona pill now appears next to the agent in Chat Explorer, including a clear label when a persona no longer exists.

Fixed Issues

- Chat Explorer export CSV files correctly populate the Persona column as "Company" for Company-persona questions.
- Archiving a currently open analysis plan in Deep Analysis no longer shows a spurious "Failed to fetch analysis plan" error after the success message.
- Typing in a dimension member's Finance Analyst description no longer lags or drops characters, and edits are preserved reliably on save.
- The persona configuration dialog shows accurate access ("Everyone" who has Finance Analyst access) for the Company persona.
- Analytics from other applications are no longer mislabeled "Unknown."
- Cube and quick views no longer drop rows containing any of the five text-based view members (Annotation, VarianceExplanation, Assumptions, AuditComment, Footnote).

Compatibility

- Minimum Platform Version 9.3.0 or later is required. OneStream recommends upgrading to the latest platform version.

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SensibleAI Agents Release PV9.3.0 SV1.1.0

This Minor release introduces Narrative Summarizer in Finance Analyst, adds inline image support to Search exports, and includes performance and stability improvements across SensibleAI Agents.

Enhancements

- **Narrative Summarizer**
  - Finance Analyst can read and summarize the commentary your team has written in OneStream, alongside the underlying financial data, rolling child account notes up into a concise parent narrative.
  - You can use it across all five OneStream text-based view members: Annotation, VarianceExplanation, Assumptions, AuditComment, and Footnote.
  - For best results, scope each summarization to a single parent rollup, and specify your desired materiality threshold, summary style, and commentary location.
  - Use it as an ad hoc request in Finance Analyst chat, or set it up as a scheduled Analysis Plan to automatically generate parent-level narratives every close cycle.
- **Cube Ingestion**
  - Performance enhancements have been added.
- Search
  - Exporting Search answers now includes inline images.

- General
    - Improved agent token efficiency for large Finance Analyst reports and long context conversations.
    - In-product evaluations AI Credit usage is now tracked and visible in the AI Control Tower.

Fixed Issues

- Deep Analysis comparison citations: Comparison output now uses source-type-specific citation formatting for document and cluster references.
- Cube deletion → persona cleanup: Deleting a cube now removes its references from persona settings; cleanup failures are logged rather than causing a 500 error on an otherwise successful delete.
- Member expansion service: This release includes a fix to the member expansion service.
- Invocations table labels: On the Credit History page in the AI Control Tower, the invocations table now categorizes MCP invocations as "MCP" instead of "Native Agents."
- Search Agent default clusters: You can now deselect a default cluster in Search that you no longer have access to or that no longer exists.
- Search Agent "All Clusters" option: The "All Clusters" option is back in the Search chat input and in the default clusters setting.

Compatibility

- Minimum Platform Version 9.3.0 or later is required. 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*.

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SensibleAI Agents Release PV9.3.0 SV1.0.0

This is the initial release of SensibleAI Agents.

Compatibility

- Minimum Platform Version 9.0.0 is required v9.3.0.

Notes

- A service account, named wernicke.server, will be added to the environment and looks like a user. It is used for scheduled jobs required within SensibleAI Agents. For example, we run a user sync to make sure SensibleAI Agents is up to date with OneStream users. Please reach out to implementation partner/team or support for more information.

Contact Support

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