onestream

SensibleAI Agents Release Notes

PV9.3.0 SV1.4.0

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SensibleAI Agents Release PV9.3.0 SV1.4.0

The theme for this Minor release is scheduled metadata sync for Finance Analyst, a Code Interpreter that shows how every calculated number was derived, and persona selection from MCP clients.

Highlights

Keep Finance Analyst in step with OneStream through scheduled metadata sync, see how every calculated number was derived with the Code Interpreter, and choose your persona from MCP clients.

Enhancements

Finance Analyst

- Administrators can keep Finance Analyst in step with OneStream on a daily, weekly, or monthly schedule, or run Sync Now at any time.
    - Only changed cubes, dimensions, and members are updated, and renamed items keep their descriptions and configuration.
    - Cube Connections shows the history of every connect, sync, and reconnect, with the last and next sync times. If a sync fails, Finance Analyst keeps answering from the last good metadata.
    - Dimensions generated by Dynamic Cube Services are refreshed in full on every sync.
    - Connecting cubes and running or scheduling a sync require the OneStream ManageMetadata role (or AdministerApplication).
    - Metadata Syncing does not block the current system. Finance Analyst will continue to read the old metadata until the Sync In is complete.
- Finance Analyst runs calculations such as totals, rankings, and variances as code over the report data it retrieved, and you can click any calculated number to see how it was calculated.
- Text, date, and list cells come back as OneStream displays them, and cube views of up to 25,000 rows are supported.
- Users can switch their Finance Analyst persona from inside MCP clients such as Claude, ChatGPT, Copilot, and Gemini. A new MCP persona setting has been added to the Chat Settings in addition to the existing default persona selector.

- Finance Analyst strictly follows each persona's cube assignment, and Finance Analyst Configuration lists only the dimensions from the selected persona's cubes.
- Memory is available as a beta. Finance Analyst can remember your preferences, such as report formatting and number presentation, across conversations, either after you approve each update or automatically. An administrator enables Memory in Application Settings, and each user then turns it on in their Memory settings.
- Stage Data drill-down is now available as a beta. Finance Analyst can trace a cube number to what makes it up: the stored cells beneath an aggregated number, largest contributors first, or the source records loaded through Stage behind an imported number, with attributes such as vendor or description. It cites the records it uses, can run calculations over them, and opens them in a detail pane with sorting, CSV export, and full screen.
    - Every drill applies your OneStream security. This beta is off by default; an administrator must submit a support ticket to enable the feature flag's visibility under AI Control Tower › Settings › Application › Feature Flags (stage_data). It is available in Finance Analyst only, not through MCP clients.

Deep Analysis

- SAI admins can edit the name, description, and access groups of any analysis plan, and archive it.

Documents

- Deleting clusters shows one summary of the files, personas, and connectors affected, and deleting a single cluster removes the files that are only in that cluster by default.
- For each conflicting file in an upload there is a clearer UI to choose whether to rename the files, replace the existing files, or remove the files from the upload.

- Files that fail the security scan count toward the estimate only if you bypass them, and connector syncs include files that will be overwritten. Files whose cost can't be estimated, such as password-protected files, can no longer be uploaded.
- Upload and connector sync requests show each file's processing stage (Scanning, Downloading, Parsing, Processing, Enhancing, Finalizing) as a progress bar, with the stages completed so far and when the file was last updated.
- The Activity, Files, Clusters, and Connectors pages refresh every few minutes, and an open request's details update on their own until it finishes.

AI Credit Usage and Control Tower

- Admins can select multiple users and set or add to their credit limits at once, and filter users by user group.
- Time and cost savings include MCP tool calls, and admins can set MCP savings factors in ROI settings.
- The onestream-fundamentals skill and Microsoft Copilot package carry your environment's version. After an upgrade, AI Control Tower shows which connected MCP clients need the new version, with a download for each, along with "Update available" badges on the Integrations page and a notification in the bell. Administrators can also choose recipients to be emailed when a future upgrade brings a new skill version.

Fixed Issues

Finance Analyst

- Report queries from Claude and ChatGPT MCP connections no longer fail with misleading “member grouping does not exist” errors.
- Trailing-month totals and averages cover the correct months when no month is specified.
- Invalid members or scenarios in formulas are caught before a report runs.
- Malformed citation links no longer show “[Blocked]” or hide numbers in answers and report canvases.
- Downloaded report PDFs no longer show a backslash before dollar amounts.
- Member Dialog parameters with no Member Filter list their members.
- Finance Analyst Configuration appears in the user menu for non-admin users with Finance Analyst access. Non-admins are still limited from making configuration updates unless they have the appropriate persona access privileges.
- The Open Quick View / Open Cube View menu is no longer cut off near the bottom of a report canvas.
- Cube and dimension ingestion no longer fails when a member, cube, or dimension is secured by a OneStream exclusion group, and Finance Analyst applies exclusion groups to member, cube, and dimension access.
- Connecting or syncing a cube with very large dimension members no longer fails partway through and rolls back.

Documents

- A cluster delete that fails restores the cluster instead of leaving it hidden and stuck in Deleting.
- The file upload review no longer collapses the file list when some files can’t skip security scanning.
- Upload, edit, and delete requests no longer stay in Scanning or Uploading when processing can’t start. The file is marked Failed and the request completes, so it can be resubmitted.
- Simultaneous approvals of the same request no longer fail with a server error, and each approval is counted once.
- Deleting a SharePoint source configuration completes even when its connector’s credentials were already removed, and the error no longer shows internal IDs.
- Creating a search persona with a name over 255 characters or a description over 500 characters is flagged in the form.

Deep Analysis

- When Deep Analysis cancels a plan, for example because a filter step leaves no documents, it explains why and suggests next steps.

AI Credit Usage and Control Tower

- Chat Explorer no longer slows down or runs out of memory in environments with many user groups.
- Analytics "last updated" shows when the data was last refreshed. MCP tool calls will no longer be represented beyond the “last updated” time.

- Credit notification settings no longer drop an email address that was typed but not yet added.
- AI credit usage is recorded when the pricing configuration can't be downloaded or includes newer rate fields.
- The How Credits Are Charged window lists Environment Operations (document uploads, connector syncs, and evaluation runs) alongside conversation usage.

Upgrade Information

- Run the environment upgrade and set up Marketplace app updates. See Environment Upgrade in the SensibleAI Agents guide.
- After upgrading, an administrator with the OneStream ManageMetadata role must open Cube Connections and run Setup Sync for each application that uses Finance Analyst. Until it finishes, Finance Analyst is unavailable to users, its configuration is read-only, and connecting or disconnecting cubes, manual sync, and schedule changes are unavailable.
- Confirm that every persona, and the Company, has cubes assigned. Finance Analyst no longer falls back to all cubes when no cubes are set.
- After upgrading, download the updated onestream-fundamentals skill for each connected MCP client (Claude, ChatGPT, Gemini, and custom clients) and the updated Microsoft Copilot package from the AI Control Tower Integrations page, and upload them to each client. AI Control Tower lists the clients that need the update.
- If deleting a SharePoint source configuration failed before the upgrade, delete it again and create a new one. The old configuration can’t be reused.

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 SV1.3.0

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, including per-page AI credit usage for document uploads and connector syncs.

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, including per-page AI credit usage for document uploads and connector syncs.

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.

AI Credits for Document Uploads

- Document uploads and connector syncs use AI credits based on the number of pages processed.
- For PDF and PowerPoint files, pages come from the page or slide count recorded in the file, so the estimate shown before upload is expected to match the credits consumed.
- For Word, text, Markdown, HTML, CSV, and Excel files, pages are calculated from characters.
- For character-based files, the estimate comes from a count taken from the raw file before upload and includes a buffer. Credits consumed are based on the actual count, which is known only after the document is processed and can be higher or lower than the estimate. The buffer applies only to the estimate.
- Document uploads, connector syncs, and evaluation runs draw from a shared environment operations credit pool instead of any individual user's AI credit limit. Administrators set the size of the pool. Credits consumed from it count toward the organization's overall AI credit allocation, and pool usage resets with other AI credit usage on the contract anniversary.

- An upload or connector sync is approved only when its estimated credits fit within both the pool's remaining credits and the organization's remaining credits. If either is short, approval is blocked, and you see a message naming the limit that was reached. Submissions that would normally be auto-approved wait for manual approval, which goes through the same check.

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.

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.
- After upgrading, an administrator must set the environment operations credit pool. Document uploads and connector syncs can't be approved until the pool has credits.

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 SV1.2.0

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.

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