



# AUTOTRIAL AI FAQ

Invitation to Test Drive Strategy AI



Last Update: May 30, 2025

# Table of Contents

What is Strategy AI and AUTOTRIAL? .....	11
What is included in my free AUTOTRIAL test drive? .....	14
How do I sign up for an AUTOTRIAL test drive? .....	15
How can I login and run dashboards? .....	15
How do I obtain AI insights using Auto Answers? .....	17
How do I instantly create a dashboard page using Auto Dashboards? .....	19
How can I create my own standalone AI bot? .....	23
Determining your bot's purpose .....	25
Choosing the right dataset(s).....	25
Preprocessing and enriching data: AI-Enabled Datasets and AI Dataset Collections .....	25
AI-Enabled Datasets .....	25
AI Dataset Collections.....	26
Exercise: Build the Call Center Analytics Bot .....	29
Access Library .....	29
Create an AI Dataset Collection.....	30
Create a derived metric.....	32
Test the derived metric .....	34
Save the AI Dataset Collection .....	35
Create your bot.....	35
Save your bot .....	36
Customize the bot's general settings .....	36
Can I report on a data warehouse schema (semantic graph)?.....	41
Can I upload my own datasets? .....	45
Can I get Architect and Auto SQL (Schema Editing) Privileges in Autotrial? .....	47
Can I connect to my own databases? .....	48
Can I share a dashboard with my peers? .....	51
How do I review the AI usage within my tenant? .....	51
Can I be notified if usage exceeds a certain threshold? .....	52
How do my tenant peers access a dashboard I shared with them? .....	53
Can I adjust the security access to an object (ACL) .....	56
Can I create objects with HTML Tags? .....	56
My data upload failed – Can the upload limit be increased? .....	57

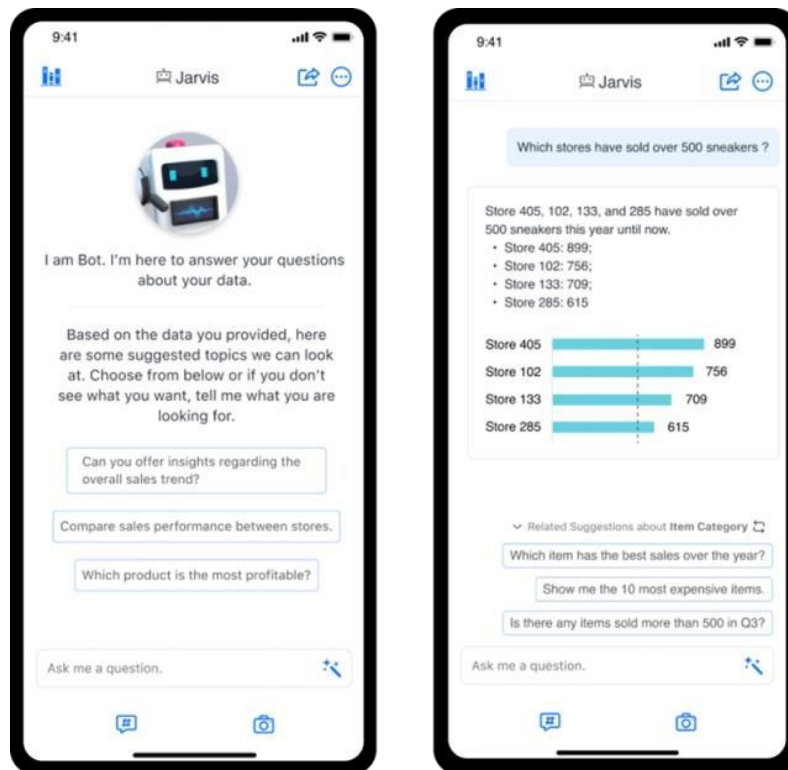
# What is Strategy AI and AUTOTRIAL?

---

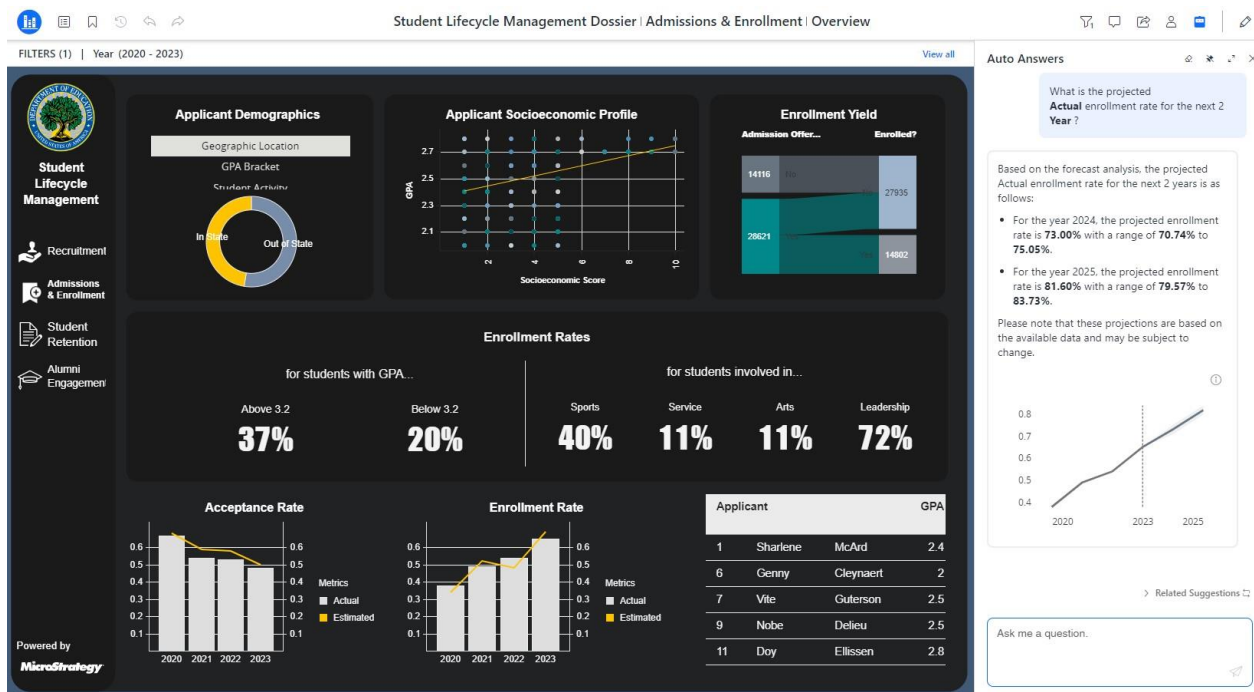
As a valued Customer, Prospect, or Partner, we invite you to embark on a test drive of Strategy AI. Join us in this immersive opportunity to explore and evaluate the transformative impact of Strategy AI firsthand.

Strategy AI combines the smartness of AI with the precision of BI.

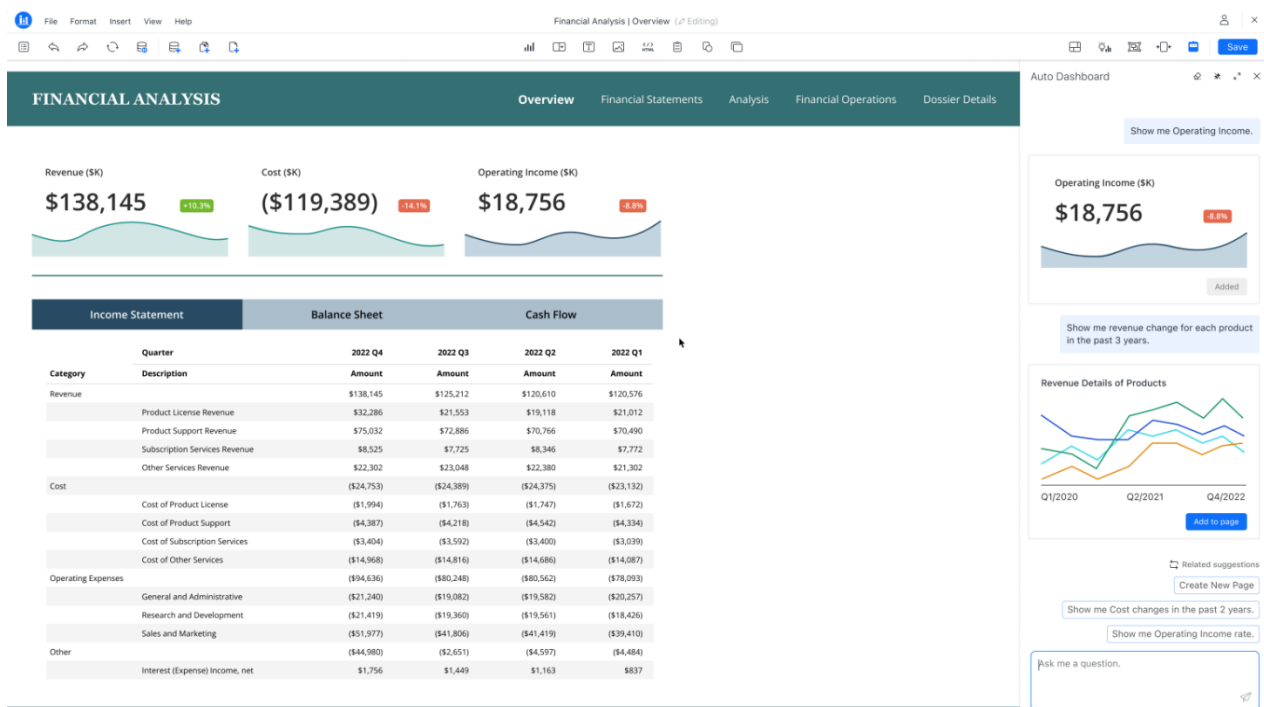
**Auto Bot**, Strategy's custom bots make it super easy for literally anyone to ask and answer questions using simple natural language - right from where they work every day. Auto Bots are super easy to build and deploy so that you can put them anywhere they are needed such as embedded in your company portal, on mobiles at your point of sale, or directly from Teams. And, each bot is highly customizable and can be quickly tailored to understand the unique needs of your business.



**Auto Answers.** Our mission is intelligence everywhere—for everyone, anywhere. The rise of large language models (LLMs) and simplicity of conversational AI allows you to extend data access. Strategy's AI-powered chatbot automatically answers questions for self-service insights that explain the "why" behind the data. Ask for specific data points, summaries, or about what-if scenarios in real time. AI simplifies analytics and lowers the barrier to access data. Embeddable in any application and supported in all languages.



**Auto Dashboards.** Unlock AI-powered design and deployment. Auto is your top collaborator on data visualizations, dashboards, reports, or entire apps—ask a question and watch content appear on your screen in seconds. Think of the data you want. And the style you want it. Auto will keep up with all your design specifications, as well as consider previous design choices and security compliance. Make changes or consult chat again for the perfect display. It's auto dashboard creation for any user, regardless of their technical proficiency.



**Auto SQL.** SQL complexity is no longer a problem. Designed for architects, automatically generate accurate and efficient SQL queries to answer business questions. Using natural language processing, Auto automatically translates plain text into SQL. This AI bot creates tables and joins on the fly, and can even make sense of the most complex SQL queries for you. Continue to provide information to adjust or optimize the SQL statements.

Could you please get top 10 best-selling products for the year 2021, broken down by season and age group of customers?

Explain

Optimize

Season	Age Group	Total Sales
Spring	18-34	50000
Spring	35-54	48000
Spring	55+	47000
Summer	18-34	46000
Summer	35-54	44000
Summer	55+	43000

Sure! The SQL query below fetches the top 10 best-selling products for the year 2021, broken down by season and age group of customers. You may insert this SQL code into the editor:

```
WITH SeasonalSales AS (  
  SELECT  
    product_id,  
    SUM(sales_amount) AS total_sales,  
    CASE  
      WHEN EXTRACT(MONTH FROM  
        sale_date) IN (3, 4, 5) THEN 'Spring'  
      WHEN EXTRACT(MONTH FROM  
        sale_date) IN (6, 7, 8) THEN 'Summer'  
      WHEN EXTRACT(MONTH FROM  
        sale_date) IN (9, 10, 11) THEN 'Autumn'  
      ELSE 'Winter'  
    END AS season  
  FROM  
    sales  
  WHERE  
    EXTRACT(YEAR FROM sale_date) =  
    2021  
  GROUP BY  
    product_id,  
    CASE  
      WHEN EXTRACT(MONTH FROM sale_
```

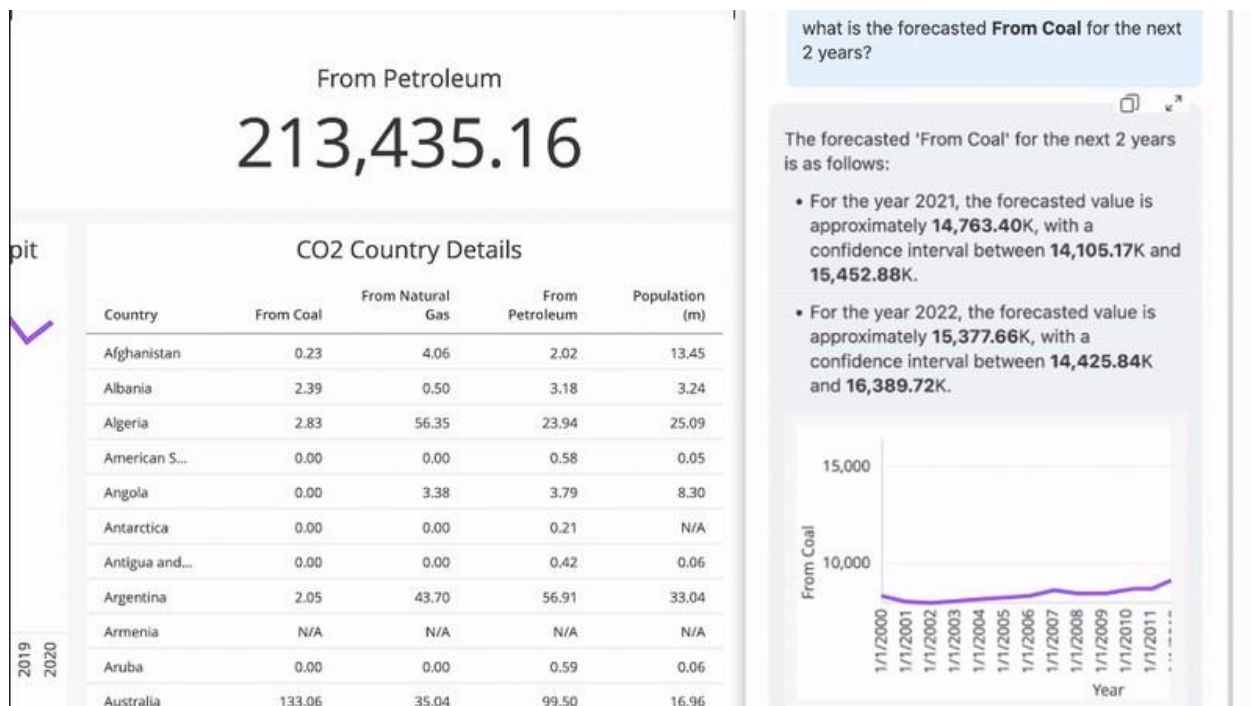
✓ Inserted

Undo

Copy

**Advanced Analytics with AI.** Revolutionize decision-making with an AI chatbot for advanced analytics. Automatically provide precise forecasting, allowing users to better anticipate market trends and optimize future strategy. Enable key driver analysis to unravel the complex web of factors that influence outcomes, helping organizations pinpoint critical drivers behind performance metrics. Or leverage Auto to track and highlight emerging data trends.





**Autotrial.Strategy.com** provides a seamless experience for Customers, Prospects, and Partners to test drive the power of Strategy AI on carefully curated industry datasets. Moreover, you have the flexibility to upload your own non-confidential, nonsensitive data, or connect to your own internet accessible databases enhancing your personalized AI experience. Obtain swift access with a streamlined automation process, empowering you to harness the potential of Strategy AI effortlessly.

## What is included in my free AUTOTRIAL test drive?

Through the complimentary sign-up process, a personalized workspace (tenant) is created specifically for your company. Your standard tenant in AUTOTRIAL includes a suite of features designed to provide a comprehensive and seamless experience:

- Exclusive access to a **dedicated company-specific workspace (tenant)**, accessible only by you and your colleagues within the same company or department.
- **Logins** for your designated company contacts.
- Capability to ask questions using **Auto Bots, Auto Answers, Auto Dashboard, Advanced Analytics with AI**.

- Optionally access to **Auto SQL** with full Architect functionality on either an empty Project or a Strategy Tutorial Project copy unleashing the power of AI/BI on a semantic graph schema.
- Flexibility to **upload your own datasets** in .csv or Excel format.
- Flexibility to **connect to your internet accessible database**.
- Option to provide a **data export for upload in a Strategy provided Database** of type SQL Server, Oracle, MySQL, Postgres or Teradata database via the Strategy DMA (DBRAT) internal service

Your dedicated Account team is committed to supporting you throughout your AUTOTRIAL experience by:

- Introducing you to your AUTOTRIAL environment.
- Providing a demonstration on how to effectively leverage Strategy AI and BI.
- Assisting with uploading and cleaning data.

AUTOTRIAL is offered free of charge, aligning with our vision to provide a direct and immersive experience with our AI and BI offerings.

## How do I sign up for an AUTOTRIAL test drive?

---

To receive your exclusive invitation, reach out to your dedicated Strategy Account team. Login details for you and your colleagues are promptly delivered via email from **autotrial.Strategy.com**.

To enhance your test drive experience, we invite you to share insights into your AI strategy and your success criteria enabling us to tailor the test drive to meet your expectations best. We value your collaboration in making this journey as impactful and relevant as possible.

## How can I login and run dashboards?

---

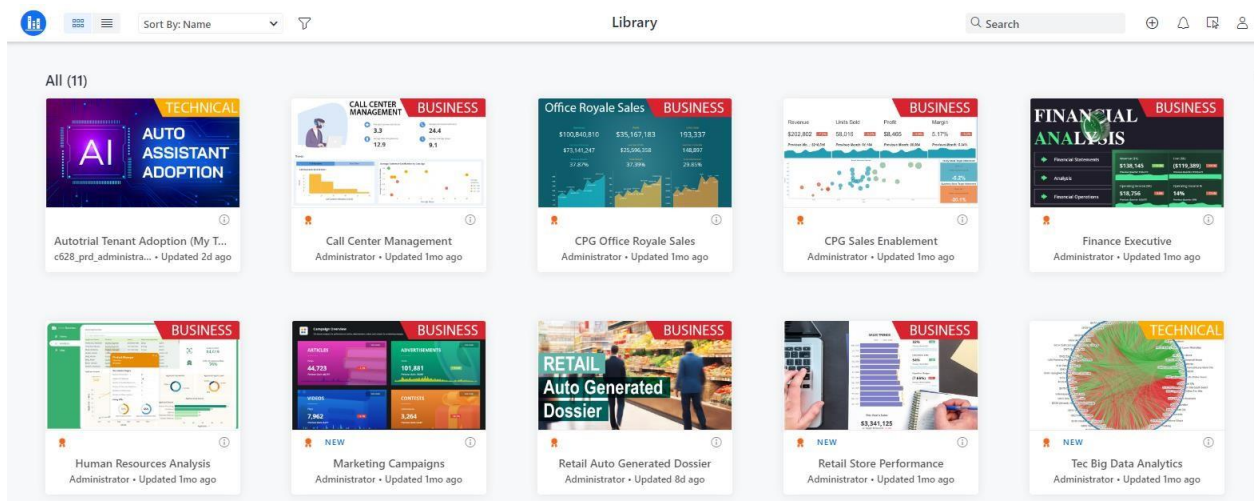
We've curated a collection of industry-specific datasets and dashboards for a seamless start. Accessing them is easy:

1. In a web browser, navigate to <https://autotrial.Strategy.com/> and enter the user name and password provided in your Welcome email.
2. Click **Log in with Credentials**.



The login form for the MicroStrategy Library. It features a blue circular icon with a white bar chart at the top. Below the icon is the text "MicroStrategy Library". The form contains two input fields: "User Name" with the value "mytenant\_mylogin" and "Password" with masked characters "\*\*\*\*\*". A blue button labeled "Log in with Credentials" is positioned below the password field.

You are logged in to Strategy Library, where you can run any of the sample dashboards with a simple click. Explore content tailored to your industry for a firsthand experience of Strategy's capabilities.



The Strategy Library dashboard interface. At the top, there is a navigation bar with a "Library" title, a search bar, and several utility icons. Below the navigation bar, a grid of 10 dashboard thumbnails is displayed, categorized by "All (11)". The thumbnails include:

- AI AUTO ASSISTANT ADOPTION** (TECHNICAL): Autotrial Tenant Adoption (My T... c628\_prd\_administra... • Updated 2d ago)
- CALL CENTER MANAGEMENT** (BUSINESS): Call Center Management Administrator • Updated 1mo ago
- Office Royale Sales** (BUSINESS): CPG Office Royale Sales Administrator • Updated 1mo ago
- CPG Sales Enablement** (BUSINESS): CPG Sales Enablement Administrator • Updated 1mo ago
- FINANCIAL ANALYSIS** (BUSINESS): Finance Executive Administrator • Updated 1mo ago
- Human Resources Analysis** (BUSINESS): Administrator • Updated 1mo ago
- Marketing Campaigns** (BUSINESS): Administrator • Updated 1mo ago
- RETAIL Auto Generated Dossier** (BUSINESS): Retail Auto Generated Dossier Administrator • Updated 8d ago
- Retail Store Performance** (BUSINESS): Administrator • Updated 1mo ago
- Tec Big Data Analytics** (TECHNICAL): Administrator • Updated 1mo ago

To learn more about using Strategy Library, take the Strategy Education course [\*\*Creative and Collaborative data: Dashboards and Strategy\*\*](#).



To learn more about Strategy and AI, take the following Strategy Education workshops:

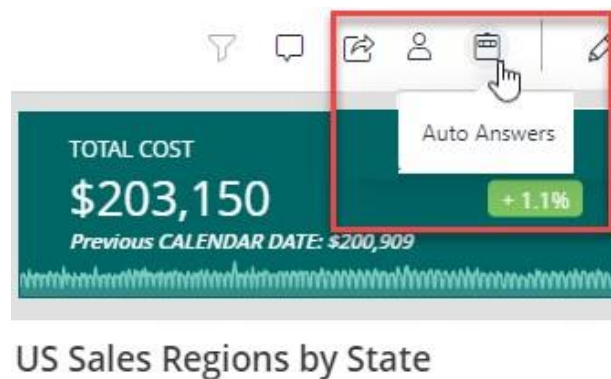
[Accelerating Analytics with AI](#)

[Build-A-Bot workshop: Harnessing AI for BI](#)

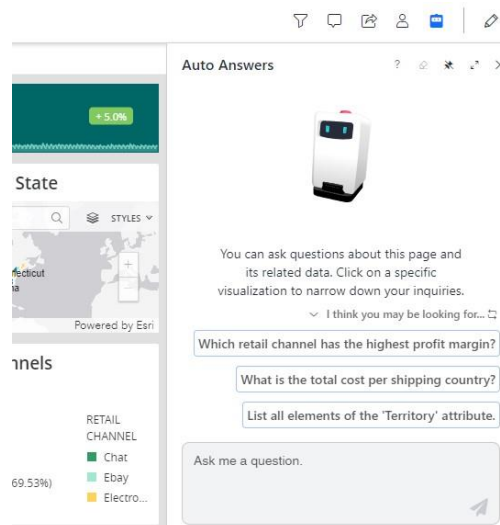
## How do I obtain AI insights using Auto Answers?

---

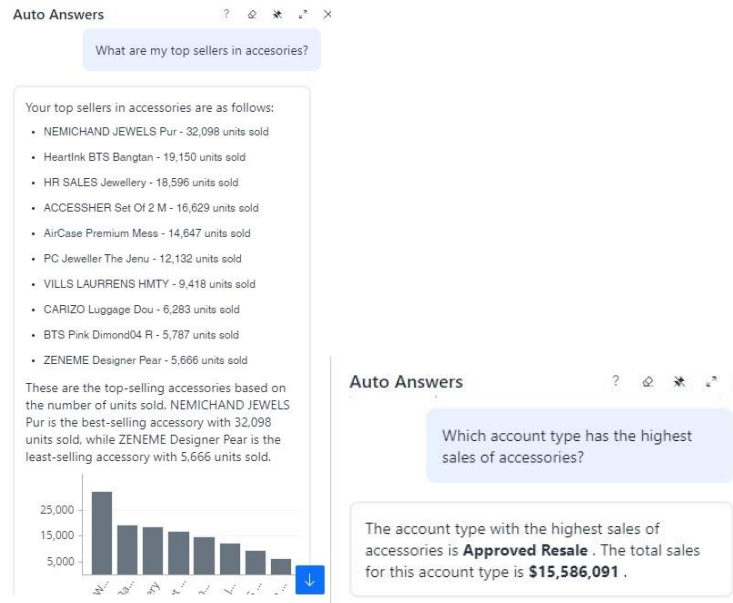
- 1) After running any of the dashboards, such as **Retail Auto Generated Dashboard**, click the **Auto Answers** icon in the right of the toolbar.




- 2) A chat box displays for you to ask questions. Select a suggested question or type your own, and then click the **Submit** icon or press **Enter**. The results generate and display in the chat.

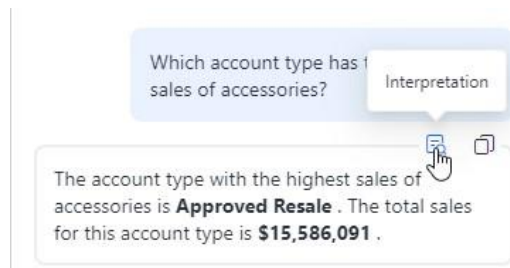


3) Continue asking questions and exploring the results.

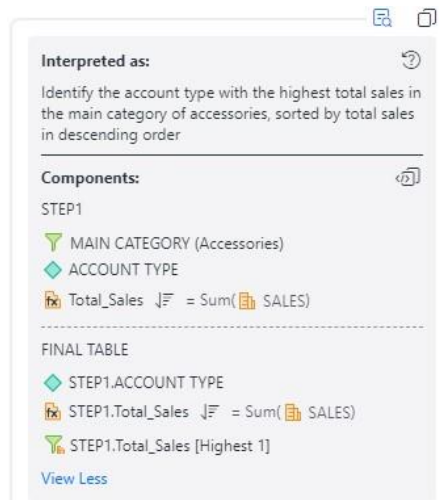


*Auto uses the chat history as context. To clear the chat history, click the **Clear History** icon  in the upper right of the chat box.*

4) To understand how Auto Answers interpreted your question, hover your cursor in the upper-right corner of the response and click the **Interpretation** icon.



The interpretation of the question and the components used to generate the response display.




Viewing the interpretation affirms the logic and criteria used to generate the response, which is especially helpful if your question contained any ambiguities.

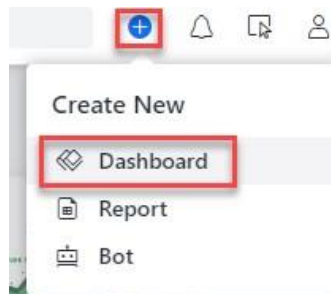
## How do I instantly create a dashboard page using Auto Dashboards?

---

Amplify your analysis experience by incorporating AI-generated dashboard pages into an existing dashboard or creating a new dashboard from scratch.

To create a new dashboard:

- 1) On your Library home page, click the **Create New** icon in the right of the toolbar and then select **Dashboard**. To navigate to your Library home page, click the Library icon  in the top left of the toolbar.



- 2) In the New Dashboard window, in the **Create Dashboard in** box, select the **Autotrial** project to create your dashboard in.
- 3) Select the dataset you want to analyze and then click **Create**. To instead start with a blank dashboard and add your own data, click **Blank Dashboard**.

New Dashboard

Create Dashboard in Autotrial

Add Data Select Template

Dataset Report

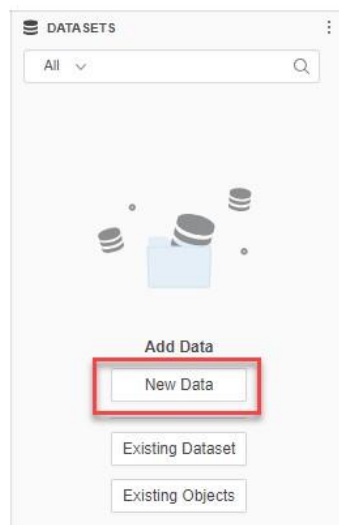
Name	Certified	Owner	Date Modified	Date Created
A.Human_Resources_An...		Administrator	2024-04-12 07:38:07	2021-10-02 23:06:19
A.Marketing_Campaign_...		c628_prd_admi...	2024-04-12 07:37:33	2024-01-17 12:43:30
A.Marketing_Campaigns...		Administrator	2023-10-13 10:47:35	2021-12-30 11:29:17
A.Metro_Mart_M		Administrator	2024-04-12 08:00:07	2024-01-04 09:12:51
A.Movies_IMDB_data_S		Administrator	2024-04-12 07:38:01	2024-03-19 11:44:06
A.Olympic_Knowlege_L		Administrator	2024-04-12 07:37:22	2024-02-13 05:25:20
<input checked="" type="checkbox"/> A.Retail_Auto_Generate...		Administrator	2024-03-08 01:31:08	2023-11-03 04:57:02
A.Retail_Baron_NobleHe...		Administrator	2024-04-12 07:37:26	2024-01-12 07:12:39
A.Retail_Insights_S		Administrator	2024-04-12 07:37:44	2024-01-17 11:33:19
A.Retail_Store_Performa...		Administrator	2024-04-12 07:38:08	2022-05-04 08:46:43
A.Salesforce_Opportuni...		c628_prd_admi...	2024-04-12 07:37:25	2024-01-17 05:27:59
A.Sommelier L		Administrator	2024-04-12 07:37:35	2024-02-16 12:57:09

Autotrial > Public Objects > Reports > Datasets > A.Retail\_Auto\_Generated\_L

Blank Dashboard Cancel Create

To add your own .csv or Excel data to a dashboard:

- 1) Click **New Data** in the Datasets panel.

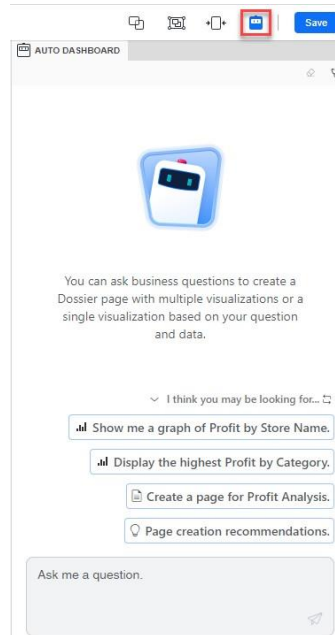


- 2) In the New Dataset window, click **File from Disk**, and then click **Choose files**.
- 3) Navigate to your file and select it, click **Open**, and then click **Import**.

- 4) Click **Save**.

To generate visualizations and pages in a dashboard:

- 1) In the dashboard, click the **Auto Dashboard** icon in the right of the toolbar. A chatbot displays suggestions for visualizations and page topics, allowing you to start exploring without delay.

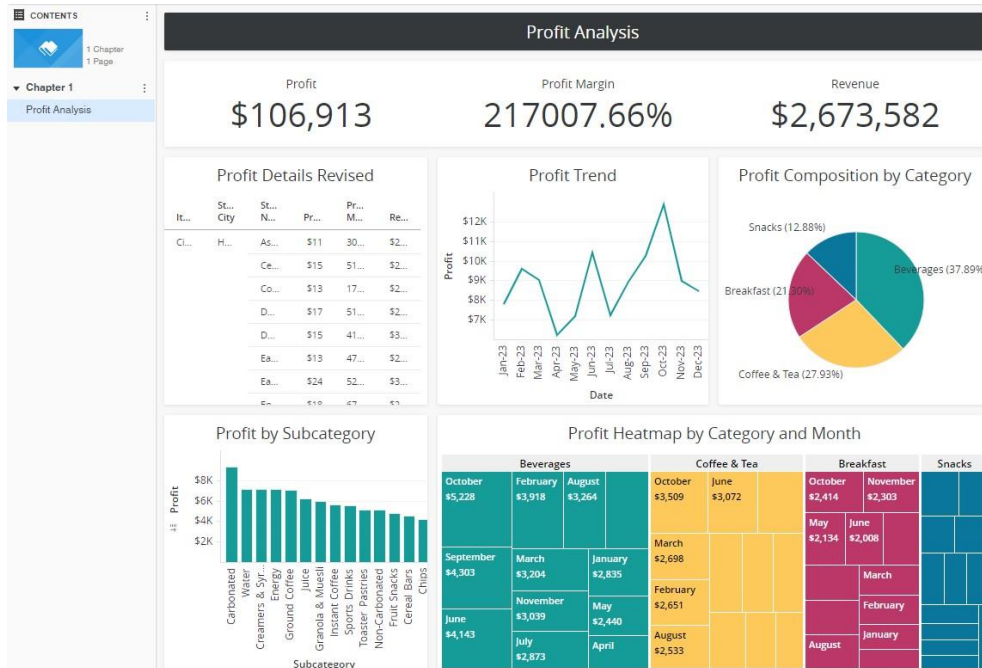


- 2) Select a suggested analysis or enter your own request.
  - If you ask for a visualization, the generated visualization displays in the chat box. You can add it to your dashboard by hovering your cursor in the upper right corner of the response and clicking the **Add to Page** icon.





- If you ask for a dashboard page, it displays on the dashboard canvas and is listed in the Table of Contents on the left.



# How can I create my own standalone AI bot?

Building your own bot is a straightforward process you can easily accomplish without any coding skills. At a high level, the steps to create a bot include:

- 1 Determine your bot's purpose based on users' end goals.
- 2 Considering your bot's purpose, determine the required dataset(s) and clean the data.

Data Wrangling

Call ID Select Function

Delete Column  
Fill Down  
Blank Down  
Remove Row(s) Where Cell Is Empty [Call ID]

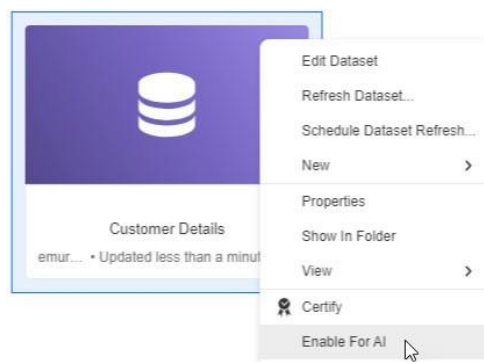
Script

Sample data: call\_center\_data.xlsx

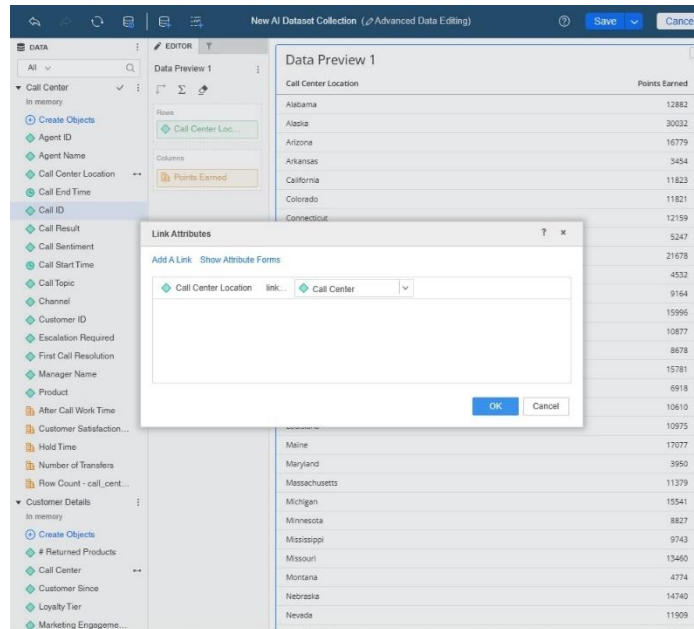
Agent ID	Agent Name	Call ID	Customer ID	Product	Call Start Time	Call End Time	First Call Resolution	Customer Satisfaction Score	Call To
1023	Anthony Jensen	43004	Rename	kyguard Smart Home System	2023-12-15T18:54:00Z	2023-12-15T19:07:00Z	Yes	2	Order 1
1037	Brandon Castillo	83507	Review	Virtual Reality Headset	2023-12-01T17:53:00Z	2023-12-01T18:04:00Z	No	3	Billing
1045	Tyler Edwards	39995	Delete Column	Estial Slow Cooker	2023-12-07T11:00:00Z	2023-12-07T11:36:00Z	Yes	5	Order 1
1027	Holly Torres	47467	Duplicate Column	For Mesh ActiveWear Top	2023-12-06T08:14:00Z	2023-12-06T08:21:00Z	Yes	1	Order 1
1003	Elizabeth Browning	92556	Fill Down	ItFit Fitness Tracker	2023-12-07T21:58:00Z	2023-12-07T22:12:00Z	No	5	Billing
1041	Maria Levy	14913	Text Selector	Ilarview Quantum LED TV	2023-12-08T05:51:00Z	2023-12-08T06:17:00Z	Yes	2	Order 1
1021	Nathaniel Hill	51036	Numeric Selector	Atom Stealth Security Camera	2023-12-15T01:23:00Z	2023-12-15T01:35:00Z	No	2	Billing
1037	Brandon Castillo	69007	To Title Case	roClean Quantum Vacuum	2023-12-13T14:38:00Z	2023-12-13T15:01:00Z	No	2	Billing
1001	Thomas Dawson	89193	To Uppercase	Light Sequin Dress	2023-12-03T01:02:00Z	2023-12-03T01:16:00Z	Yes	4	Billing
1022	James Higgins	51913	To Lowercase	ItFit Fitness Tracker	2023-12-17T11:36:00Z	2023-12-17T12:02:00Z	No	5	Account
1040	Joy Rogers	97690		roid Coffee Maker	2023-12-15T28:36:00Z	2023-12-15T28:51:00Z	No	5	Order 1
1001	Thomas Dawson	56127		Estial Slow Cooker	2023-12-04T22:52:00Z	2023-12-04T23:03:00Z	Yes	1	Account
1030	Joan Peters	35467		ney to the Stars: A Space Odyssey	2023-12-10T14:24:00Z	2023-12-10T14:53:00Z	Yes	2	Billing
1050	Michaela Pierce	11455		ora Athletic Shorts	2023-12-01T12:12:00Z	2023-12-01T12:27:00Z	Yes	3	Order 1
1023	Anthony Jensen	96858		NovoFlare LED Projector	2023-12-06T19:52:00Z	2023-12-06T20:02:00Z	Yes	2	Billing
1036	Jeff Ortiz	75390		Hand Held Dry Vacuum	2023-12-17T22:18:00Z	2023-12-17T22:34:00Z	No	3	Order 1
1018	Nicole Lucas	99572		NovoFlare LED Projector	2023-12-14T19:40:00Z	2023-12-14T20:02:00Z	Yes	1	Account
1039	Gilbert Hill	80493		CrystalClear Water Filter	2023-12-05T01:12:00Z	2023-12-05T01:21:00Z	No	2	Billing
1034	Deborah Ortega	23640		LightScribe 3D Printer	2023-12-15T09:07:00Z	2023-12-15T09:18:00Z	Yes	4	Account
1000	Gregory Harper	3896		Meteor Mesh ActiveWear Top	2023-12-06T14:33:00Z	2023-12-06T15:00:00Z	Yes	4	Order 1
1030	Joan Peters	34132		Nebula Knit Sweater	2023-12-07T16:11:00Z	2023-12-07T16:33:00Z	Yes	2	Order 1
1009	Holly Case	47322		GalaxyGuard Smart Home System	2023-12-01T12:55:00Z	2023-12-01T13:18:00Z	No	2	Billing

1 - 50 / 400 Rows

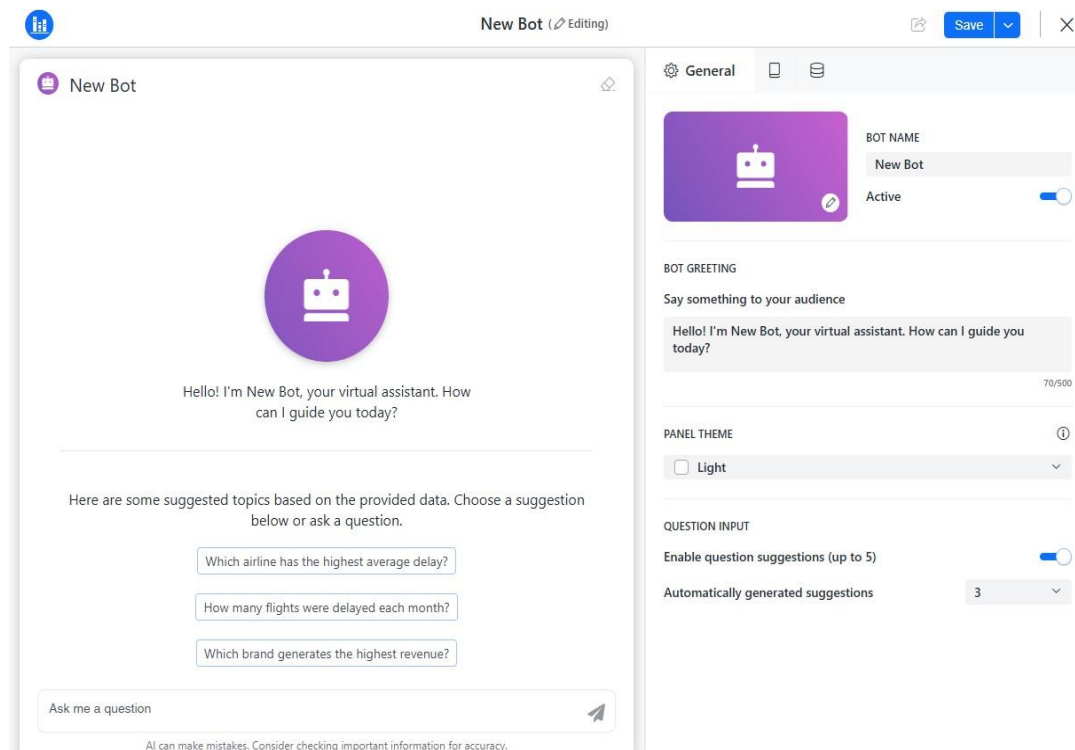
- 3 Enable the dataset(s) for AI.



#### 4 Refine the dataset(s) in an AI Dataset Collection, and add it to a bot.



#### 5 Create and customize the bot using an intuitive interface.



## Determining your bot's purpose

Your bot should help end users achieve specific goals. Gathering the right information from the right people is the first step in understanding a business's need and is also as the first step in the planning process for creating a bot. The early involvement of your users is crucial to the adoption of the bot. Clearly understand the business goals and the overall company vision before you start to build the bot.

In the case of Potomac Autoparts, an automotive parts company, a bot was designed to assist account managers and sales executives in their tasks and help them understand various aspects of data analytics for optimized sales. The analyst who built the bot interviewed the managers to understand the jobs to be done, not just what data they want to see. He understood the primary tasks the managers wanted to accomplish with this bot, from analyzing individual sales performance to customer management.

## Choosing the right dataset(s)

After determining the bot's purpose, select the dataset(s) your bot uses. The dataset(s) should contain all the information the bot needs to answer the questions it will be asked. The analyst at Potomac Autoparts, for instance, chose a dataset that contained all the information their sales team needed. This dataset included details such as product descriptions, pricing, inventory levels, compatibility with car models, and customer reviews. Having this comprehensive information enables the bot to provide accurate and timely responses to customer inquiries.

Preparing your data well is important for the success, performance, and adoption of your bot. For example, ensure the data is clean and objects are clearly named with terminology and conventions your users are familiar with.

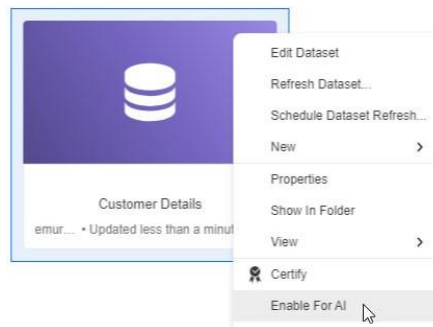
## Preprocessing and enriching data: AI-Enabled Datasets and AI Dataset Collections


### AI-Enabled Datasets

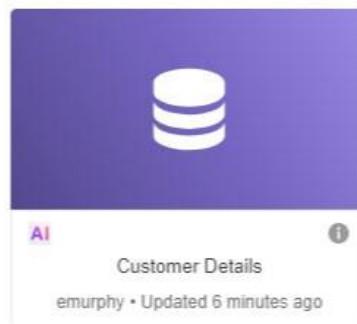
Once you choose a dataset and ensure it's clean, enable the dataset for AI to use it in a bot. When you enable a dataset for AI, Strategy then pre-processes and enriches it to make it more usable by AI models. For example, descriptions and context are added to the data, and important entities like names and locations are

noted. This ensures the data is well organized, detailed, and ready for intelligent processing.

To enable a dataset for AI, right-click the dataset in Workstation and select **Enable for AI**.




Once the processing is complete, the dataset displays an AI icon .



## AI Dataset Collections

AI-enabled datasets are the basis of AI Dataset Collections, which are used to create bots. An AI Dataset Collection can consist of a single or multiple AI-enabled datasets. They are standalone objects that can be used across multiple bots, providing consistency and efficiency.

You create AI Dataset Collections in Library as you create a bot. In the Library toolbar, click the **Create New** icon  and select **Bot**. In the New AI Dataset



Collection window, select the dataset(s) to include in the collection, and then click **Create**. Only AI-enabled datasets are available to select.

New AI Dataset Collection

Create Bot In 

MicroStrategy Tutorial

Add Data

	Name	Certified	Owner	Date Modified	Date Created
<div><div>Dataset</div></div>	<div><input checked="" type="checkbox"/></div> Call Center		emurphy	2025-02-25 13:05:19	2025-02-25 12:33:22
	<div><input checked="" type="checkbox"/></div> Customer Details		emurphy	2025-02-25 13:04:41	2025-02-25 12:59:16
	<div><input type="checkbox"/></div> BR Schedule Dataset Ex...		Gregory Axelrod	2025-02-25 12:17:40	2025-02-25 12:17:21
	<div><input type="checkbox"/></div> BR Dataset Export		Gregory Axelrod	2025-02-25 11:56:33	2025-02-25 11:55:54
	<div><input type="checkbox"/></div> MW Blending Cube 2		Michal Wasiluk	2025-02-25 09:06:14	2025-02-25 09:05:35
	<div><input type="checkbox"/></div> MW Blending Cube 1		Michal Wasiluk	2025-02-25 09:06:12	2025-02-25 09:05:08
	<div><input type="checkbox"/></div> AgReserves   CEO - Sam...		ijjungberg	2025-02-25 06:32:02	2025-02-25 06:31:45
	<div><input type="checkbox"/></div> GS Data		Donghyub Lee	2025-02-25 00:58:16	2025-02-24 22:49:59
	<div><input type="checkbox"/></div> SIERA AI POC Dataset	<div></div>	Kevin Rooney	2025-02-24 20:24:38	2025-02-24 11:21:15
	<div><input type="checkbox"/></div> ndowns_RegEd_Complia...		Nathan Downs	2025-02-24 19:08:11	2025-02-24 11:58:57
	<div><input type="checkbox"/></div> gtlg_gfs_small_sample	<div></div>	Gareth La Grange	2025-02-24 14:55:54	2025-02-24 14:55:34
	<div><input type="checkbox"/></div> Netflix Movies		Vasant Paranjpe	2025-02-24 14:54:11	2025-02-24 14:30:36

2 selected

Cancel

Create

Within an AI Dataset Collection, you can create derived metrics, rename attributes and metrics, and define relationships between datasets. You can display the data in a grid to verify its details and accuracy.

The screenshot displays the 'New AI Dataset Collection' interface in 'Advanced Data Editing' mode. The interface is divided into three main sections: a left sidebar, a central editor, and a right data preview.

**Left Sidebar (DATA):** Contains a search bar and a list of attributes. The 'Call Center' category is expanded, showing attributes like 'Agent ID', 'Agent Name', 'Call Center Location', 'Call End Time', 'Call ID', 'Call Result', 'Call Sentiment', 'Call Start Time', 'Call Topic', 'Channel', 'Customer ID', 'Escalation Required', 'First Call Resolution', 'Manager Name', 'Product', 'After Call Work Time', 'Customer Satisfaction...', 'Hold Time', 'Number of Transfers', and 'Row Count - call\_cent...'. The 'Customer Details' category is also expanded, showing attributes like '# Returned Products', 'Call Center', 'Customer Since', 'Loyalty Tier', and 'Marketing Engage...'. The 'Call Center Location' attribute is selected.

**Central Editor (EDITOR):** Shows 'Data Preview 1' with a table of data. The table has two columns: 'Call Center Location' and 'Points Earned'. The 'Rows' section shows a list of states: Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, and so on. The 'Columns' section shows a list of attributes: 'Call Center Loc...', 'Points Earned', and so on.

**Right Data Preview:** A table showing the data for 'Call Center Location' and 'Points Earned'. The table lists states and their corresponding points earned.

**Link Attributes Dialog:** A modal dialog box titled 'Link Attributes' is open. It contains a search bar and a list of attributes. The 'Call Center Location' attribute is selected, and the 'link...' button is clicked. The dialog shows a list of attributes, including 'Call Center Location', 'Call Center', and so on. The 'Call Center' attribute is selected.

Call Center Location	Points Earned
Alabama	12882
Alaska	30032
Arizona	16779
Arkansas	3454
California	11823
Colorado	11821
Connecticut	12159
	5247
	21678
	4532
	9164
	15996
	10877
	8678
	15781
	6918
	10610
	10975
Maine	17077
Maryland	3950
Massachusetts	11379
Michigan	15541
Minnesota	8827
Mississippi	9743
Missouri	13460
Montana	4774
Nebraska	14740
Nevada	11909


The collection serves as an enhanced data structure the bot uses to generate accurate and context-aware responses. As AI Dataset Collections are reusable, standalone objects, you can use them to create corresponding dashboards or other bots.

# Exercise: Build the Call Center Analytics Bot

You are an analyst at QuantumGalaxy Gadgets, a large eCommerce company that sells a variety of goods and has several call centers across the United States. You received a request from the call center managers to help address performance challenges.

The managers are concerned about declining customer satisfaction rates, low call sentiment scores, and the number of call escalations. Develop a bot specifically for call center managers, providing them with insights to enhance their decision making and improve overall call center operations.

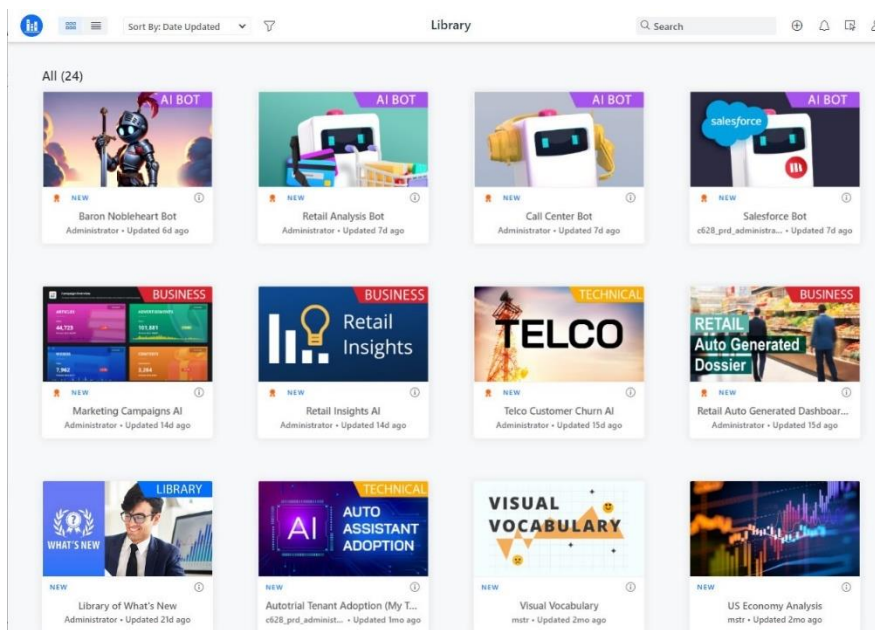
## Access Library

- 1 In the Strategy Autotrial email, click the **AI Autotrial** icon  to access your Library. Or, in a web browser, navigate to:

<https://autotrial.microstrategy.com/>

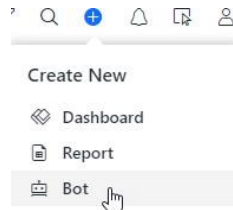
The Library login page displays.

- 2 In the **User Name** and **Password** boxes, type (or copy and paste) the credentials provided in the Strategy Autotrial email.
- 3 Click **Log in with Credentials**. Your Library home page displays, including various sample dashboards and bots. An example is shown below; the objects in your Library might differ.

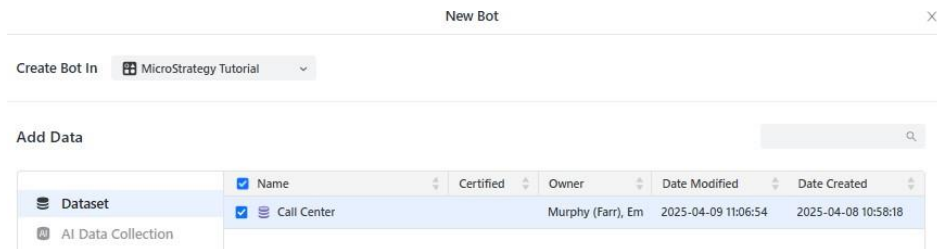


# Create an AI Dataset Collection

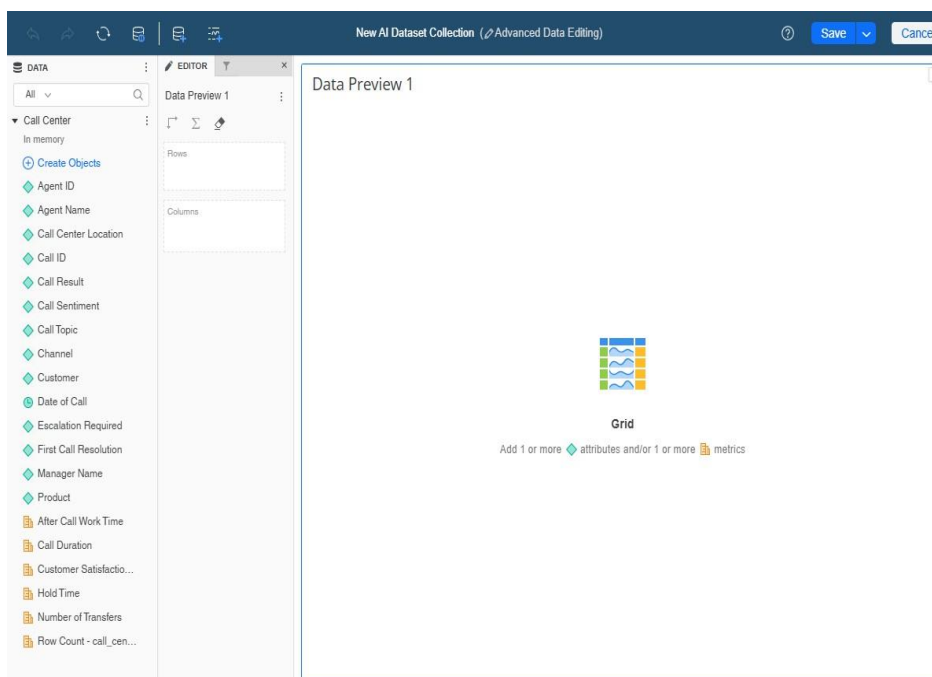
- 1 Click the **Create New** icon  , then select **Bot**.



- 2 In the **Create Bot In** drop-down list, ensure the **Tutorial** project is selected.
- 3 The datasets you want to use are AI-Enabled but are not yet part of an AI Dataset Collection. Ensure **Dataset** is selected in the left pane, then select the check box for the **Call Center** dataset. Click **Create**.

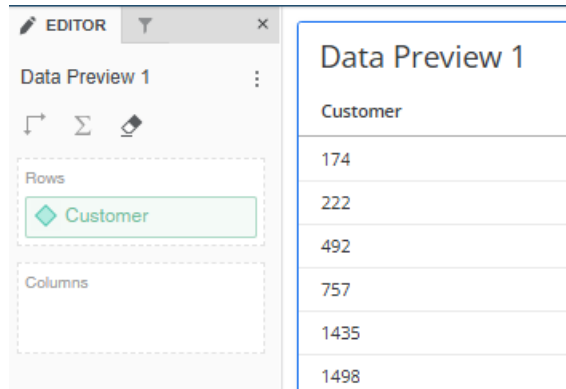


*AI Dataset Collections can include multiple datasets; for this scenario, you only need the Call Center dataset.*

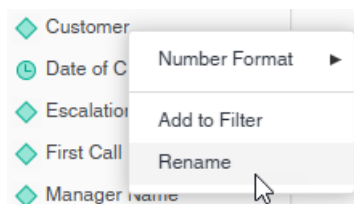


The New AI Dataset Collection window displays with your selected dataset in the Data panel on the left.

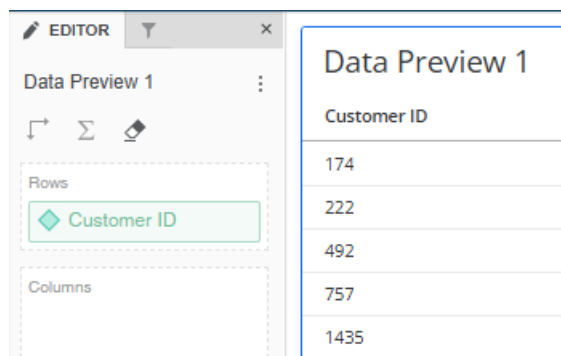
- 4 Preview your data to see if it needs any changes. Double-click the **Customer** attribute to display it in the Data Preview grid.



- 5 You notice that the data values for Customer are customer IDs rather than customer names. Clarify this in the attribute name so users know what to expect. In the Data panel, right-click **Customer** and select **Rename**.



- 6 Type **Customer ID** and press **Enter** to rename the attribute. The update displays in Data panel, Editor panel, and preview grid.



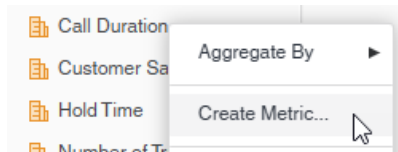


## Create a derived metric

Derived metrics perform a calculation on the fly using data already available in datasets. This provides an easy way to present the data in different ways. For example, you might use derived metrics to quickly perform on-the-fly analyses such as margins, contributions, and differences between metrics.

The Call Center dataset contains Call Duration and Hold Time, but it would be helpful to know the time spent interacting with a customer during a call based on the difference between these metrics. Create an Interaction Time derived metric that performs this calculation.

- 7 In the Call Center dataset, right-click **Call Duration** and select **Create Metric**.



- 8 In the bottom left of the Metric Editor window, click **Switch to Formula Editor**.
- 9 Click **Clear** above the Formula box on the right.



- 10 Double-click **Call Duration** to add it to the Formula box.

**Data**

All

- Customer
- Date of Call
- Escalation Required
- First Call Resolution
- Manager Name
- Product
- After Call Work Time
- Call Duration**
- Customer Satisfaction...

Metric Name:  [Metric Options](#)

**Formula**

+ - × ÷ ( ) < > [Clear](#)

[Call Duration]

Require validation? [Validate](#)

- 11 Click the subtraction symbol **-** above the Formula box to add it to the formula.

+ **-** × ÷ ( ) < >

[Call Duration]-

- 12 Double-click **Hold Time** to add it to the formula.

**Formula**

+ - × ÷ ( ) < >

[Call Duration]-[Hold Time]

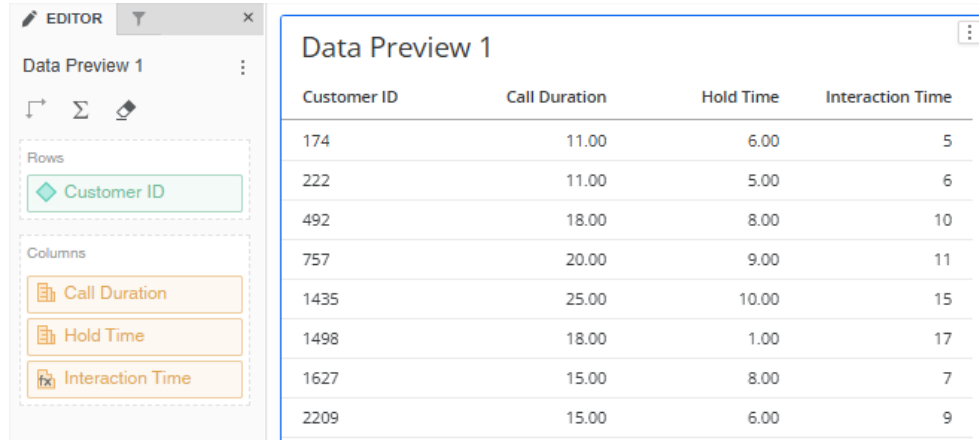
- 13 In **Metric Name** box at the top of the Metric Editor, rename **New Metric** to **Interaction Time**.

- 14 Click **Save**. The derived metric, Interaction Time, displays in the Call Center dataset. The derived metric icon contains an fx to differentiate it from the regular metric icon.

- After Call Work Time
- Call Duration
- Customer Satisfactio...
- Hold Time
- fx Interaction Time**
- Number of Transfers
- Row Count - call\_cen...

## Test the derived metric

- 15** In the Data panel, double-click **Call Duration**, **Hold Time**, and **Interaction Time** (in that order) to add them to the preview grid.

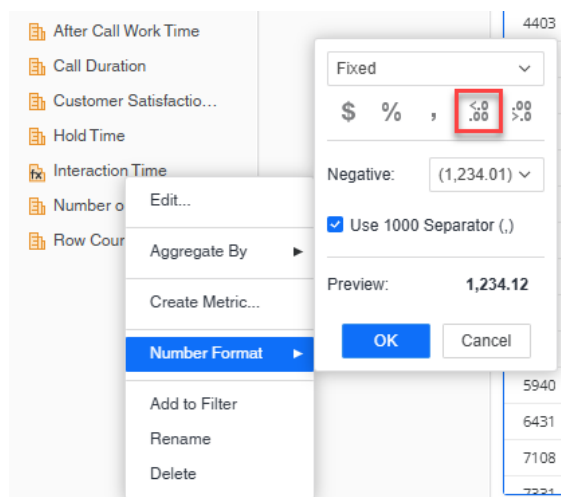


Customer ID	Call Duration	Hold Time	Interaction Time
174	11.00	6.00	5
222	11.00	5.00	6
492	18.00	8.00	10
757	20.00	9.00	11
1435	25.00	10.00	15
1498	18.00	1.00	17
1627	15.00	8.00	7
2209	15.00	6.00	9

You can confirm that Interaction Time calculates correctly. For example, for Customer ID 174 (the first row in the grid), a Call Duration of 11.00 minus a Hold Time of 6.00 does indeed equal an Interaction Time of 5.

- 16** Format the Interaction Time values to match the formatting of Call Duration and Hold Time (two decimal points). Right-click **Interaction Time** in the Data panel and point to **Number Format**.

- 17** Click the **Increase Decimal** icon  twice to add two decimals to the number format. Then, click **OK**.




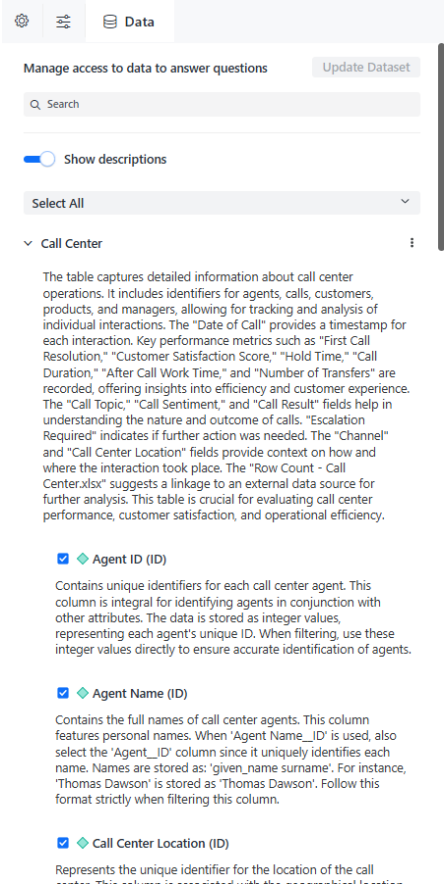
You can verify your changes in the preview grid, where the Interaction Time values now display with two decimals.

## Save the AI Dataset Collection

- 18 To save your AI Dataset Collection, click **Save** in the right of the toolbar.
- 19 In the Save AI Dataset Collection window, in the **Name** box, type **QuantumGalaxy**.
- 20 In the **Save in** drop-down list, select **My Reports**.
- 21 Click **Save**. The New Bot window displays for you to create your bot.

## Create your bot

- 1 In the New Bot window, click the **Data** icon  to display the Data panel. The dataset from your AI Dataset Collection displays.



Manage access to data to answer questions Update Dataset

Search

☒ Show descriptions

Select All

Call Center

The table captures detailed information about call center operations. It includes identifiers for agents, calls, customers, products, and managers, allowing for tracking and analysis of individual interactions. The "Date of Call" provides a timestamp for each interaction. Key performance metrics such as "First Call Resolution," "Customer Satisfaction Score," "Hold Time," "Call Duration," "After Call Work Time," and "Number of Transfers" are recorded, offering insights into efficiency and customer experience. The "Call Topic," "Call Sentiment," and "Call Result" fields help in understanding the nature and outcome of calls. "Escalation Required" indicates if further action was needed. The "Channel" and "Call Center Location" fields provide context on how and where the interaction took place. The "Row Count - Call Center.xlsx" suggests a linkage to an external data source for further analysis. This table is crucial for evaluating call center performance, customer satisfaction, and operational efficiency.

☒ Agent ID (ID)

Contains unique identifiers for each call center agent. This column is integral for identifying agents in conjunction with other attributes. The data is stored as integer values, representing each agent's unique ID. When filtering, use these integer values directly to ensure accurate identification of agents.

☒ Agent Name (ID)

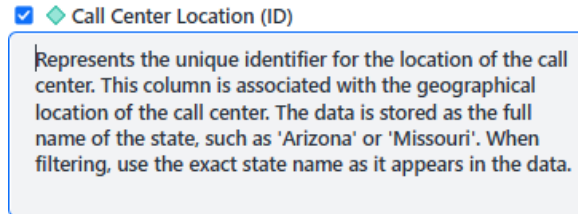
Contains the full names of call center agents. This column features personal names. When 'Agent Name\_ID' is used, also select the 'Agent\_ID' column since it uniquely identifies each name. Names are stored as 'given\_name surname'. For instance, 'Thomas Dawson' is stored as 'Thomas Dawson'. Follow this format strictly when filtering this column.

☒ Call Center Location (ID)

Represents the unique identifier for the location of the call center. This column is associated with the geographical location.

- 2 Review the descriptions of the dataset, attributes, and metrics. These were generated when you enabled the dataset for AI. The descriptions ensure the bot has a detailed, contextual understanding of the dataset and its objects, enabling it to more accurately interpret the data and provide relevant responses to queries.

To edit a description, click the description box and make your edits. Any edits you make to the descriptions are automatically saved.



It's best practice to keep the automatically generated descriptions, as the default structure ensures the descriptions are uniform and constructed in a way the large language model (LLM) can understand. It is better to add more information to the description, adding more clarity or context, than to remove the automatically generated information.

## Save your bot

- 1 Click **Save**. In the **Name** box, type **Call Center Analytics Bot**. This is the name of your bot object that displays in Library.
- 2 In the **Save in** drop-down list, select **My Reports**.
- 3 Click **Save**.

## Customize the bot's general settings

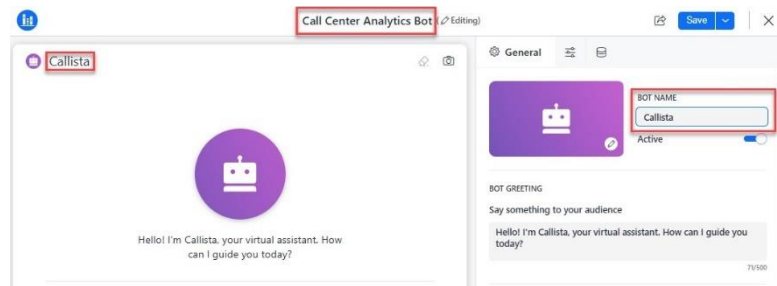
- 1 Click the **General** icon  to display the General panel. Here you can customize the bot name and greeting, among other features.

### Adjust the bot name, image, and greeting

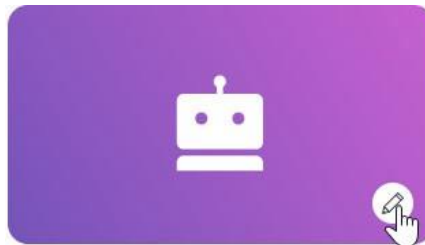
- 2 The bot name you assign in the General panel can be different than the name you used to define the object in Library. For example, you used a descriptive name to define the object in Library (Call Center Analytics Bot) but want a creative, personable name within the bot itself. In the **Bot Name** box, type **Callista**.



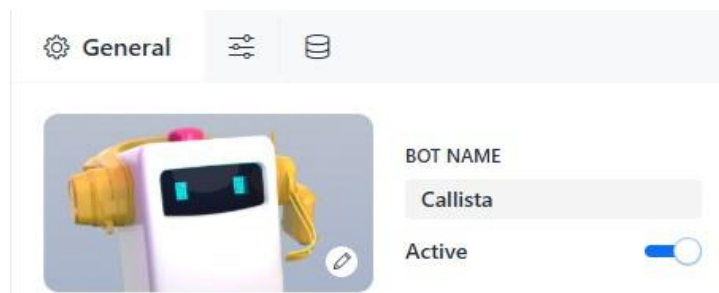
The name in the chat panel changes, but the object name at the top of the Editor remains the same.



- 3 Change the bot's cover image to better fit its theme. Click the **Edit** icon on the current cover image.



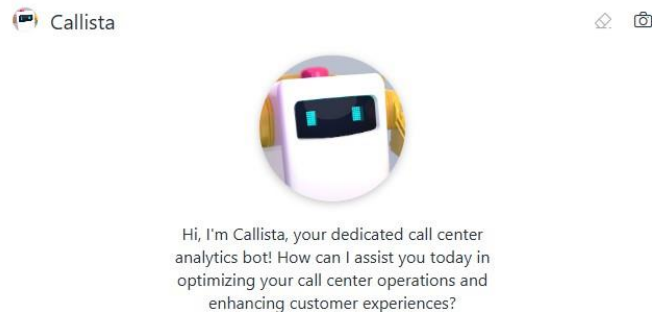
- 4 In the Change Cover Image window, you can add a custom image using a URL or choose from the sample images. Select **Auto with a yellow headset** from the sample images, and click **Save**.



- 5 Add a greeting to help the end users. A greeting can set expectations regarding the bot's capabilities and purpose while adding a personality. Highlight the text in the **Say something to your audience** box, and press **Delete**.
- 6 In the **Say something to your audience** box, type the following: **Hi, I'm Callista, your dedicated call center analytics bot! How can I assist you today in**

## optimizing your call center operations and enhancing customer experiences?

The new cover image and greeting display in the chat panel.



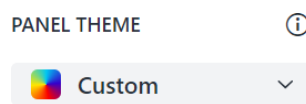
### Adjust the bot's color themes

- 7 The QuantumGalaxy Gadgets branding team created a color palette you can leverage to align the bot with



corporate standards.

Click the **Panel Theme** drop-down list. You can select from predefined themes or create your own. To add your corporate colors, select **Custom**.



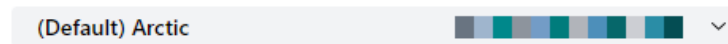
- 8 Add the HEX numbers listed below:

- Background: **#7B9AA0**
- Text: **#FFFFFF**
- Accent Color: **#030303**

- Canvas Color: **#4D6470**

- 9 You can also choose a predefined theme for visualizations. From the **Visualization Palette** drop-down list, select **Arctic**, as it best matches your corporate colors.

#### VISUALIZATION PALETTE



## Enable snapshot and interpretations

- 10 Under Optional Features, ensure that **Allow saving answers to “My Snapshots”** is toggled on. This allows users to save the bot responses they want to refer back to later in the My Snapshots panel. For example, users can save important metrics on a monthly basis, enabling easy comparisons over time.
- 11 Ensure **Enable Interpretation** is toggled on. Interpretations provide transparency with Auto’s decision-making process, showing how it arrived at its response and therefore increasing user trust.
- 12 Ensure **Enable Insights** is toggled on so that the bot provides the user with insights beyond a basic response.

#### OPTIONAL FEATURES

Allow saving answers to “My Snapshots”



Enable Interpretation ⓘ



Enable Insights ⓘ



## Adjust settings for question suggestions

- 13 In the Question Input area, ensure **Enable question suggestions (up to 5)** is toggled on. When a user asks a question, the bot generates relevant suggestions, helping users continue to efficiently engage with the content.

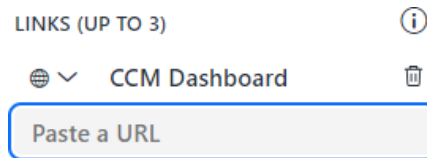
## Add links

Sometimes the information a user needs might be extensive or detailed. Providing a relevant link can offer users more in-depth information without overwhelming

them by including long text in the chat. You want to provide a link to the Call Center Management dashboard, which details call center performance and open cases.

**14** In the Links area, click **Add Link**.

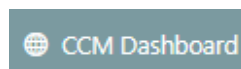
**15** Click **New Link**, and type **CCM Dashboard**.




**16** In the **Paste a URL** box, add the following link:

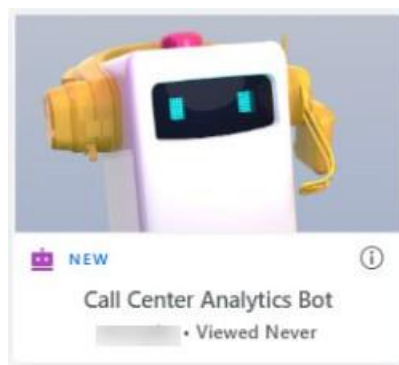
**<https://autotrial.microstrategy.com/MicroStrategyLibrary/app/205BABE083484404399FBBA37BAA874A/4480640B11EAF10334D90080EF950B74/share>**



**17** In the **Display Format** drop-down list, select **Icon + text**.  
The link and icon display in the upper right of the bot.



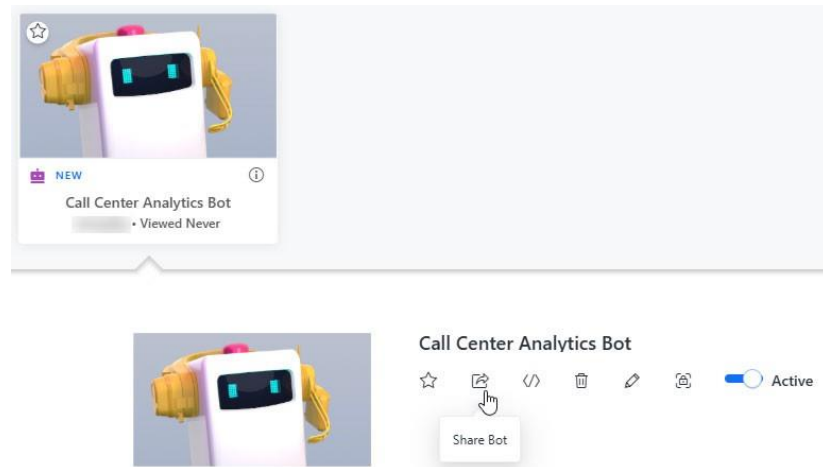
**18** Click **Save**.

**19** Click the **Library** icon  to return to your Library home page. Your bot displays in the content area.



**20** Click the **Info** icon  in the bot's tile to view actions. For example, you can click the **Share Bot** icon  to share it

with your colleagues (though you're not ready to do that at this point).



## Can I report on a data warehouse schema (semantic graph)?

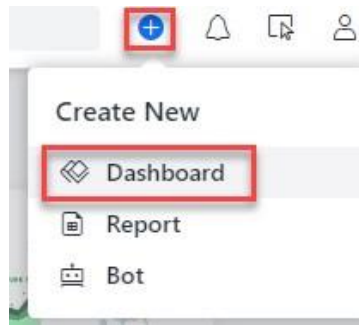
---

A key strength of Strategy is how insights are generated on top of a semantic graph that spans a data warehouse with many tables stored in a database. The tables and columns of the data warehouse are mapped to business concepts (attributes), measures (metrics), and business rules, creating the semantic graph. A business user can add those attributes and metrics to reports and dashboards to analyze their data. The unique Strategy multi-pass SQL engine translates the business user request, efficiently executes it on the database, and returns the results.

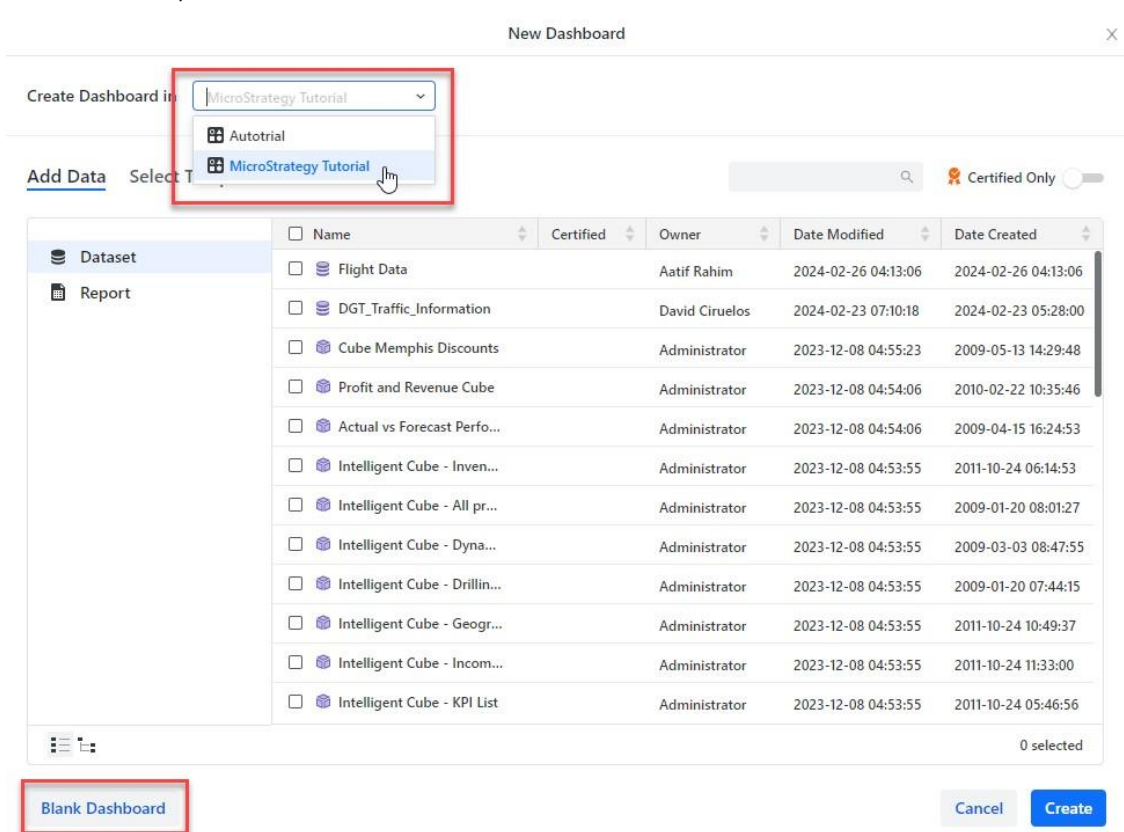
Strategy AI leverages the power of the semantic graph. To demonstrate, the AUTOTRIAL environment contains a Retail Data Warehouse stored in a relational database in the Strategy Tutorial project.

To create a dashboard on top of a schema:

- 1) On your Library home page, click the **Create New** icon in the right of the toolbar and then select **Dashboard**.



- 2) From the **Create Dashboard in** box, select the **Strategy Tutorial** project. Then, click **Blank Dashboard**.



- 3) In the Datasets Panel of the dashboard, click **New Data** to select objects from the semantic graph.
- 4) In the Add Existing Objects window, select **Attributes** in the first drop-down list, and then navigate through the subfolders. Double-click an attribute to add it to your selections.

Add Existing Objects?×

Attributes

Customers

Geography

- Call Center
- Country
- Distribution Center
- Employee
- Employee Age
- Employee Birth Date
- Employee Experience
- Employee FTE Flag

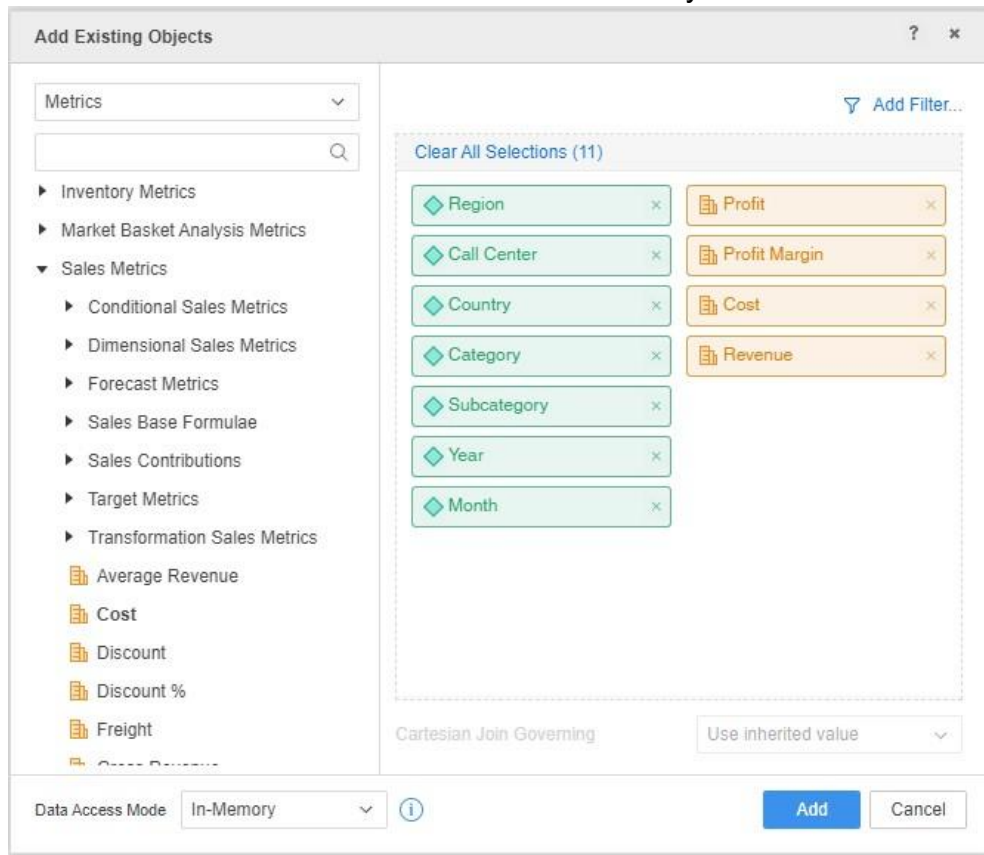
Add Filter...

Clear All Selections (7)

- Region
- Call Center
- Country
- Category
- Subcategory
- Year
- Month

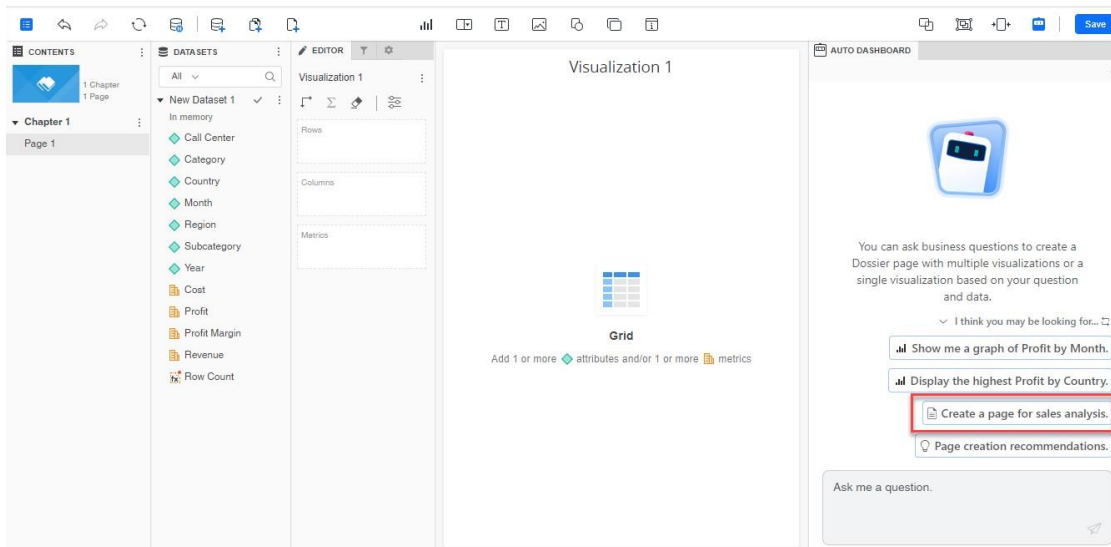


- 5) Select **Metrics** in the first drop-down list, and then navigate through the subfolders. Double-click a metric to add it to your selections.

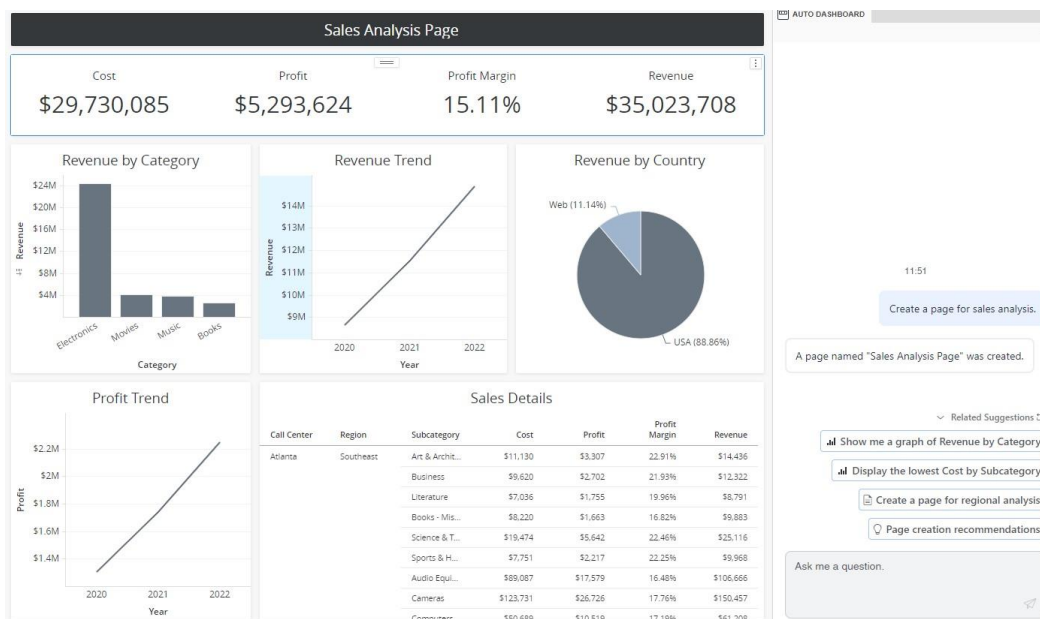


- 6) When you finish selecting attributes and metrics, click **Add**.

The new virtual dataset created on top of the semantic graph displays in the Datasets Panel. To use objects for your analysis, drop and drag them into the dashboard canvas or the Editor panel. Or, consult Auto, your AI assistant, for analysis suggestions. In the example below, the user picks the suggestion **Create a page for sales analysis**.



Auto generates a dashboard page, as shown in the example below. The results are retrieved efficiently from the data warehouse database.



- 7) **Save** your results. In the Strategy Tutorial project, you have a shared tenant folder under **Shared Reports\Tenants\<MyTenant>(Tutorial)**.

## Can I upload my own datasets?

Absolutely! Any user within a customer tenant or their designated Strategy Support team, such as a Sales Engineer (SE), can seamlessly upload data and create custom datasets. You can do this using Strategy Workstation (our free desktop tool) or Strategy Web.

- To download Strategy Workstation, go to:  
<https://community.Strategy.com/s/products>

See [this video](#) for details on creating a dashboard in Workstation using your own data.

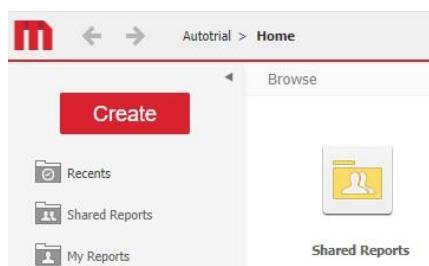
- To access Strategy Web, go to:  
<https://autotrial.Strategy.com/Strategy/servlet/mstrWeb>

To create a dashboard using your own data in Strategy Web:

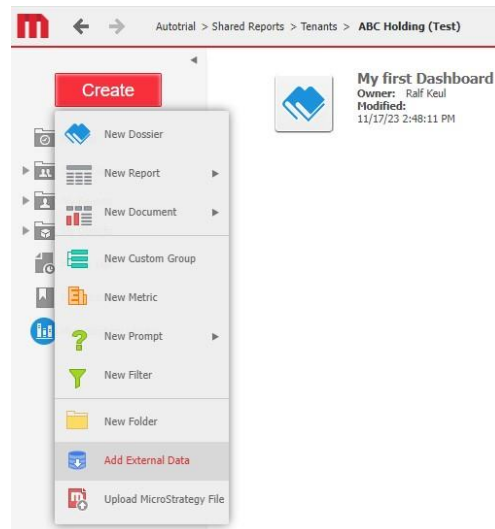
- 1) Log in using your AUTOTRIAL credentials.
- 2) Click the **Autotrial** project.



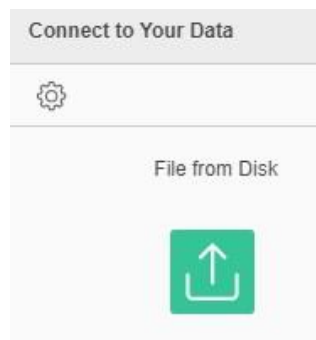
- 3) Click **Shared Reports**.



- 4) Click **Tenants**, and then click your specific tenant.
- 5) Click **Create**, and then select **Add External Data**.



6) To upload data in .csv or Excel format, select **File from Disk**.



7) Click **Choose Files**, navigate to your file and select it, and then click **Open**.

8) Optionally, click **Prepare Data** to refine your data.

9) Click **Finish**.

10) Save the dataset in your **Shared Reports\Tenants\<MyTenant>** folder to share it with your tenant peers, or save it in **My Reports** to have it only accessible by you.

You can now use the dataset to create a dashboard.

## Can I get Architect and Auto SQL (Schema Editing) Privileges in Autotrial?

---

On the standard projects Autotrial and Strategy Tutorial every user is a power user and can create, run and share bots, dashboards, reports and import data into MTDI (Multi Table Data Import) Cubes.

To create and edit the Schema consisting of Attributes, Facts and Hierarchies on top of data sources additional Architect Privileges and a dedicated project are required. This is required to work with Auto SQL as well.

If Customers, Prospects or Partners want to use this functionality, please reach out to your Account team to enable your Autotrial tenant with

- A dedicated empty Project Greenfield\_<Tenant> that can be connected to a customer database or a Strategy Database with customer data, and or
- A dedicated Strategy Tutorial Project copy Tutorial\_<Tenant> that represents a sample Retail Project on top of a Postgres Sample Retail Warehouse Database. While the Project Schema can be edited and extended, the Postgres Warehouse Database is read only

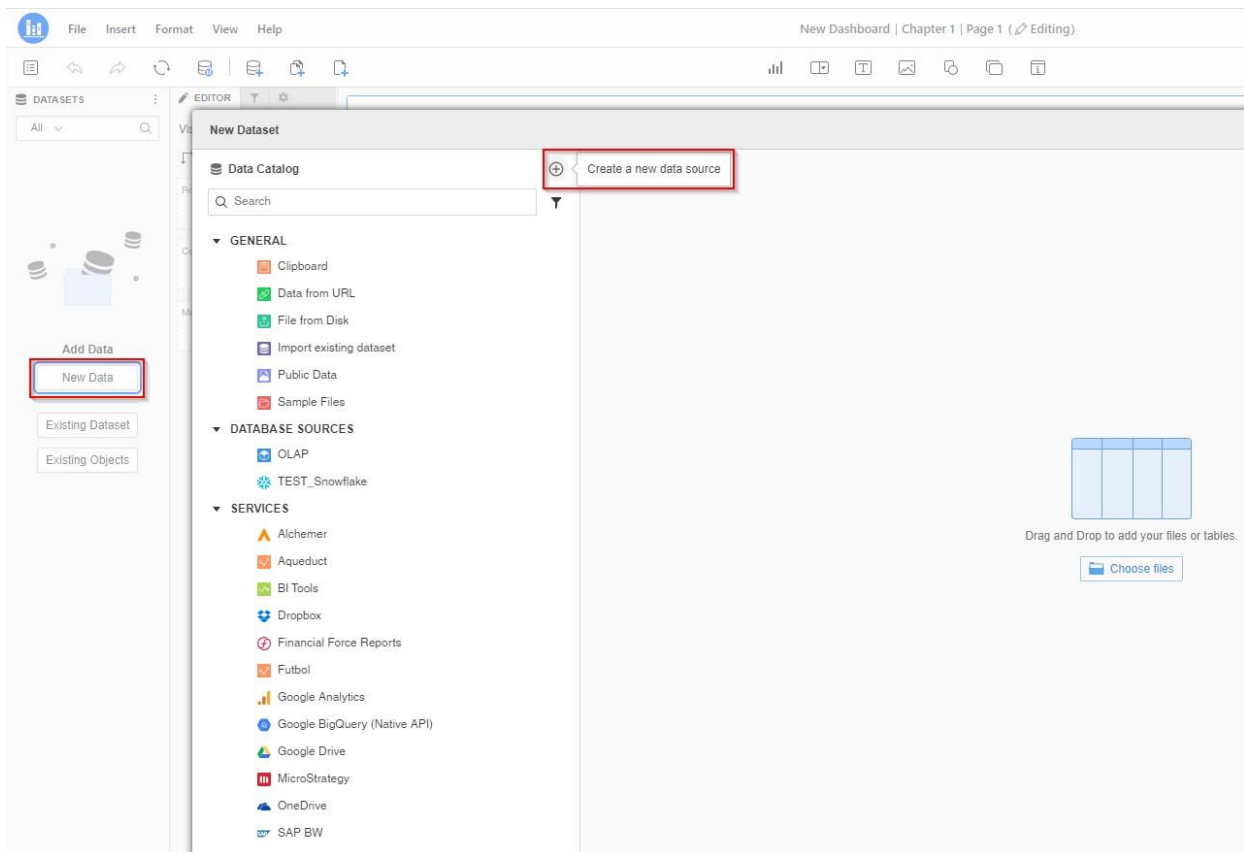
To create and edit schema objects all tenant users will get Strategy Architect and Auto SQL privileges on top of these projects.

## Can I connect to my own databases?

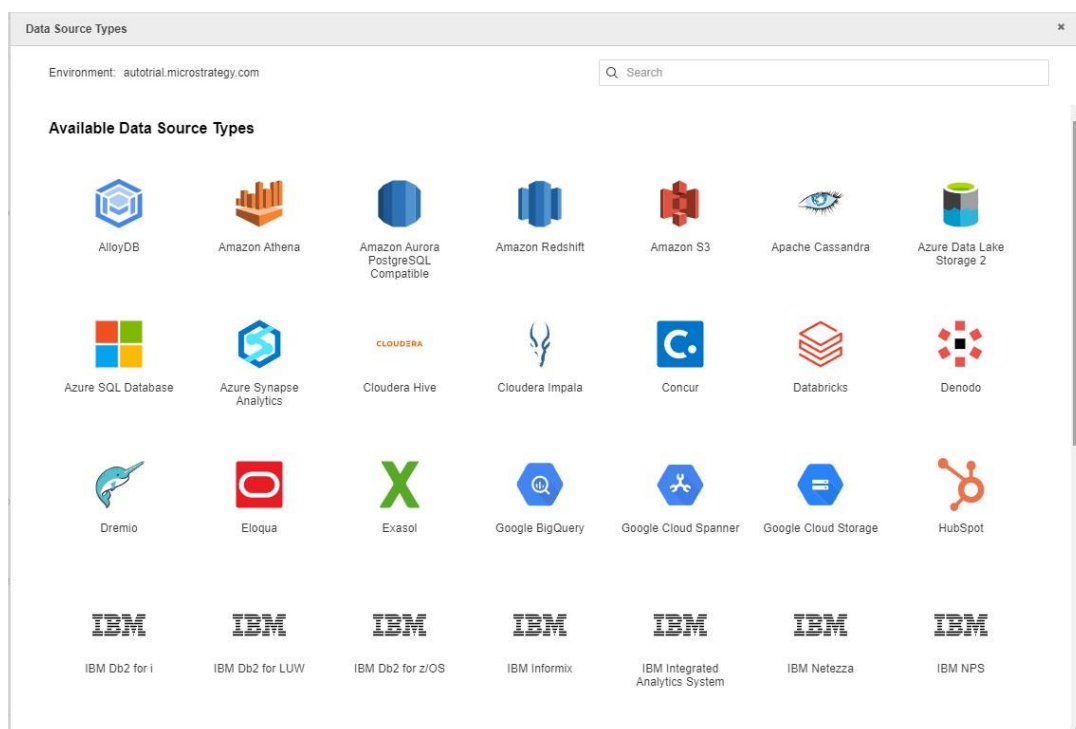
---

Yes. Strategy offers a large number and wide variety of out of the box Data Sources you can connect to. If the customer has a data source that is accessible via the internet a Data Source connection can be created from the Autotrial environment via Self-Service.

Dashboards, Bots and MTDI (Multi Table Data Import) Cubes can then be created on top of Customer Databases.



New Data Dialog showing first set of data sources from a dashboard



Available Data Sources showing after clicking on Plus Symbol

Based on customer's firewall setup the customer might need to whitelist the IP of our NAT Gateway 52.6.136.90 on the Port used for the DSN-less connection.

If a direct access to a customer's own database is restricted by customer's policies but the customer is able to provide a database extract and want to access it through a database, the Strategy account team can set up a dedicated database of type SQL Server, Oracle, MySQL, Postgres or Teradata database via the Strategy DMA (DBRAT) internal service and provide access to the Autotrial tenant.

For Schema creation on top of such a database, please refer to the Architect and Auto SQL requirements in previous chapter.

Find further information on the Creation of Data Sources here:

[https://www2.Strategy.com/producthelp/Current/Workstation/enus/content/create\\_edit\\_data\\_sources.htm](https://www2.Strategy.com/producthelp/Current/Workstation/enus/content/create_edit_data_sources.htm)

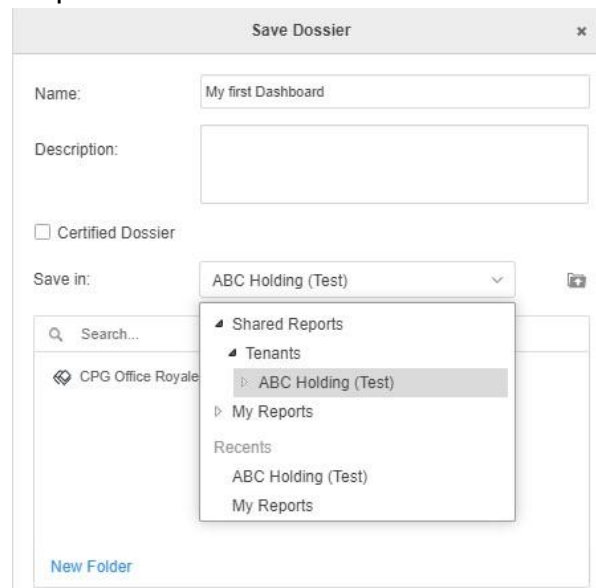


## Can I share a dashboard with my peers?

---

Each user in a tenant has access to a dedicated personal folder **My Reports** and a **shared tenant folder** located at **Shared Reports\Tenants\<MyTenant>**.

- The My Reports folder is accessible only to you.
- The shared tenant folder is accessible to all users within that specific tenant. Save your dashboards and datasets in this folder to share them with your tenant peers.



## How do I review the AI usage within my tenant?

---

Every tenant user has access to the **Autotrial Tenant Adoption (My Tenant)** dashboard from their Library home page.

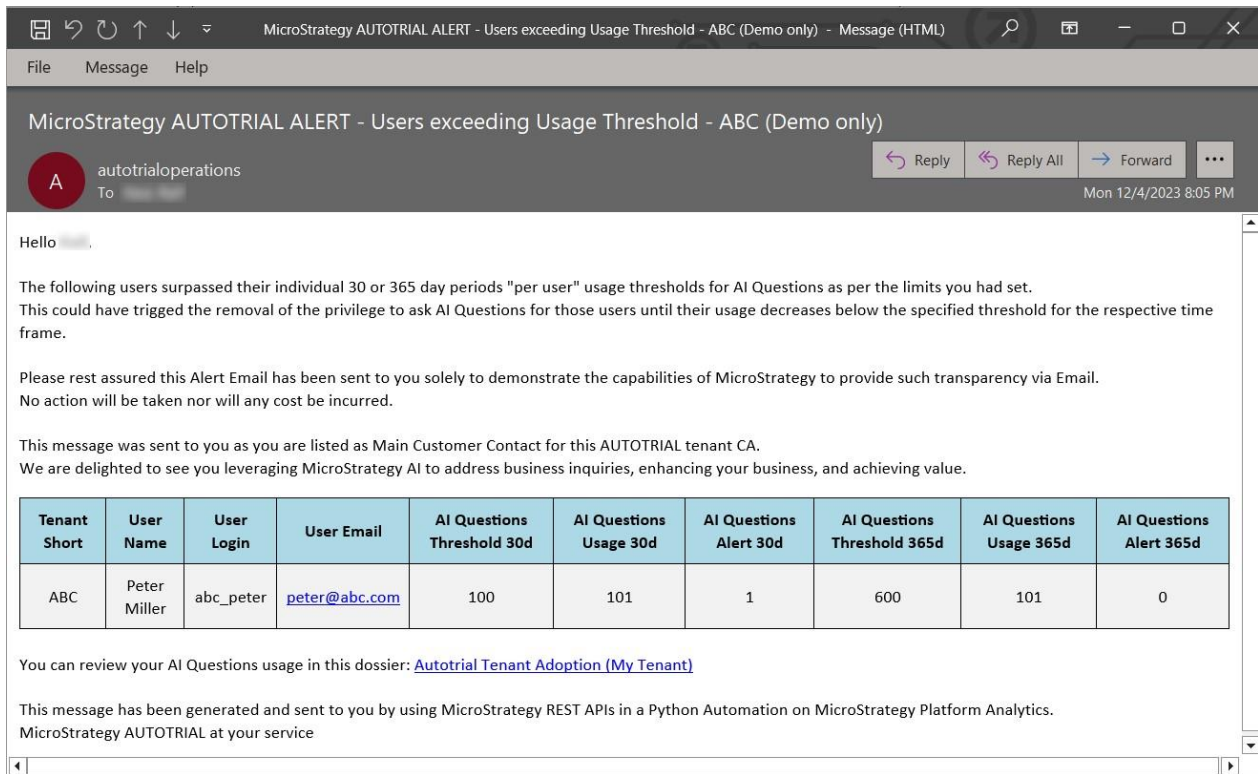


This comprehensive dashboard provides insights into tenant-specific adoption metrics, including the overall number of AI questions asked, user-specific breakdowns, usage journal, and alerts.



## Can I be notified if usage exceeds a certain threshold?

To increase transparency on AI question usage, if a user exceeds the default threshold of 100 AI questions per 30 days, the main tenant contacts receive an email alert. An example is shown below.



In the AUTOTRIAL environment, this is in place to demonstrate the email alert functionality, so the User remains fully AI enabled and no costs occur. Once the user falls back under the 30-day threshold, the main contacts receive another email alert that user is back below the threshold. In a productive implementation, you can customize the functionality to automatically disable or enable AI access for individuals based on usage.

## How do my tenant peers access a dashboard I shared with them?

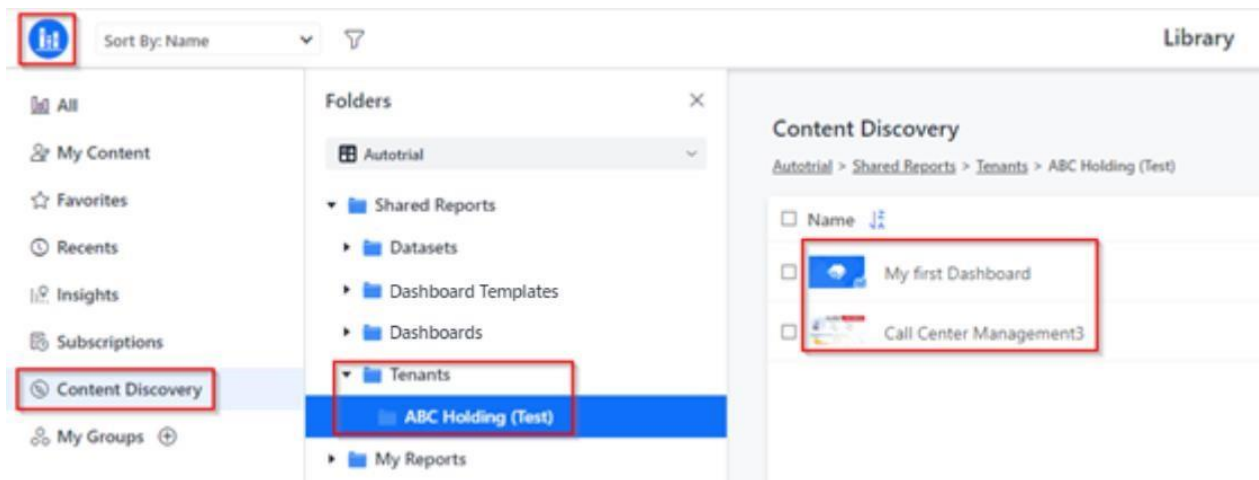
Your tenant peers can access a shared dashboard through Content Discovery or by email.

To access a dashboard through Content Discovery:

- 1) On the Library home page, click the **Library** icon to display the sidebar.



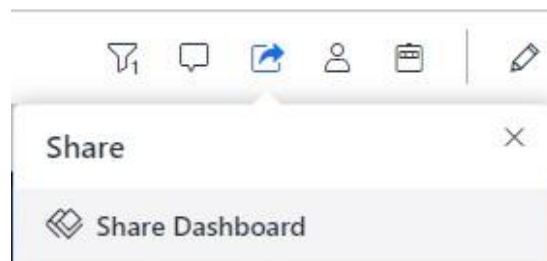
- 2) In the sidebar, click **Content Discovery**. In the Folders panel, navigate to the shared tenant folder under **Shared Reports\Tenants**.



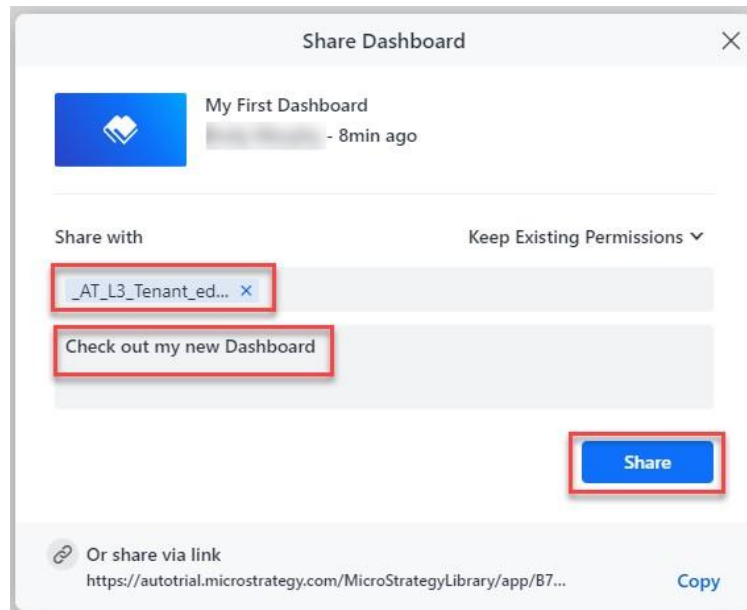
- 3) Click a dashboard in the Content Discovery area on the right to open it.

To share a dashboard via email:

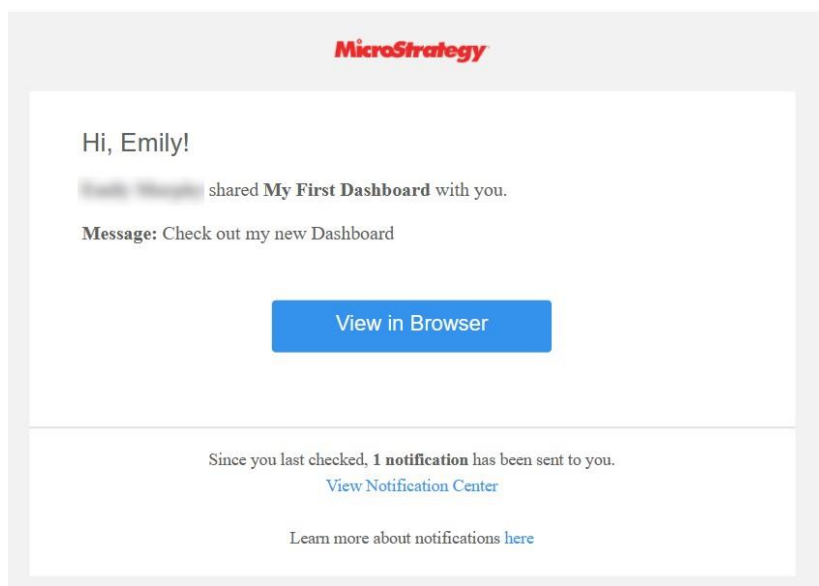
- 1) Open the dashboard you want to share, click the **Share** icon in the right of the toolbar, and then select **Share Dashboard**.



- 2) In the **Share with** box, start typing the user you want to share the dashboard with, and select their name when it displays in the drop-down list. To share with your tenant user group rather than individual users, start typing your tenant name that starts with **\_AT\_L3\_Tenant** and includes your tenant name, and select it from the drop-down list when it displays.
- 3) Optionally, type a message to your peers. Then, click **Share**.

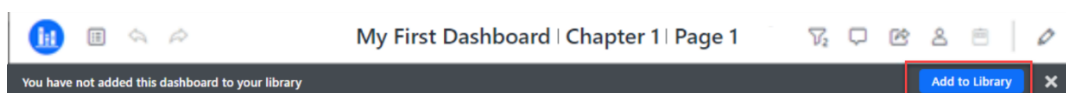


4) Your peers receive an email with the link to the dashboard.



To add a shared dashboard to your Library:

1) Open the dashboard and click **Add to Library** in the upper right.



When you navigate to your Library home page, the dashboard displays.



(ACLs) can be set to control who has which access. Right click on an object in Strategy Workstation, select Properties and Security Access and set the desired ACLs. You can search and add each individual member of your tenant or your tenant user group that starts with the prefix `_AT_L3_Tenant <Tenant>`.



By default dashboards, visualizations, metrics and attributes don't support HTML content for security reasons. If HTML content is required, please reach out to your technical Strategy Account team that can be enabled to create HTML content by the Autotrial administrator.

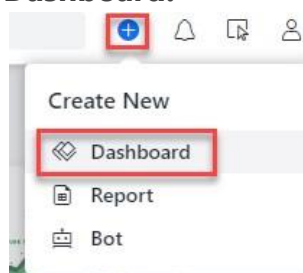
## My data upload failed – Can the upload limit be increased?

Sufficiently large limits are in place, allowing you to upload datasets up to 5 GB if you are in the right project. If you attempt to upload your own dataset and receive an error showing you exceeded a limit of 30 MB, then you are most likely in the wrong project. A project is a container for storing objects. There are three different projects available for you in AUTOTRIAL:

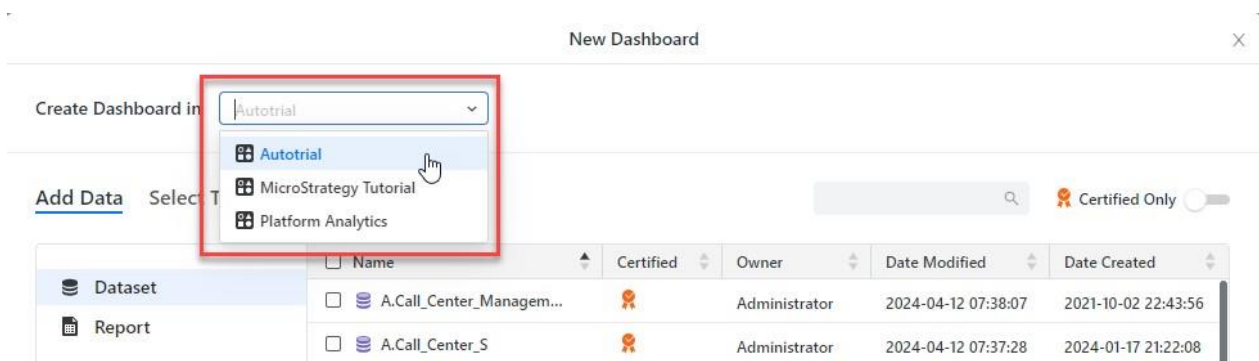
Project Name	Purpose
Autotrial	Main project for uploading your own data and creating and customizing dashboards.
Strategy Tutorial	Retail use case project on top of a Retail Data Warehouse, allowing you to experiment with AI on top of a schema.
Platform Analytics	Project solely for usage statics, such as those in your Autotrial Tenant Adoption dashboard. Provides limited privileges and is not for storing or uploading data – read only.

You select the project early in the dashboard creation process. To create a dashboard in the Autotrial project and upload your data:

- 1) On your Library home page, click the **Create New** icon in the right of the toolbar and then select **Dashboard**.



- 2) In the New Dashboard window, in the **Create Dashboard in** box, select **Autotrial** before proceeding with any other action.



For datasets larger than these limits, please reach out to your Account Executive and/or Sales Engineer to facilitate the upload.

**Enjoy your test drive with Strategy AI and AUTOTRIAL!**



