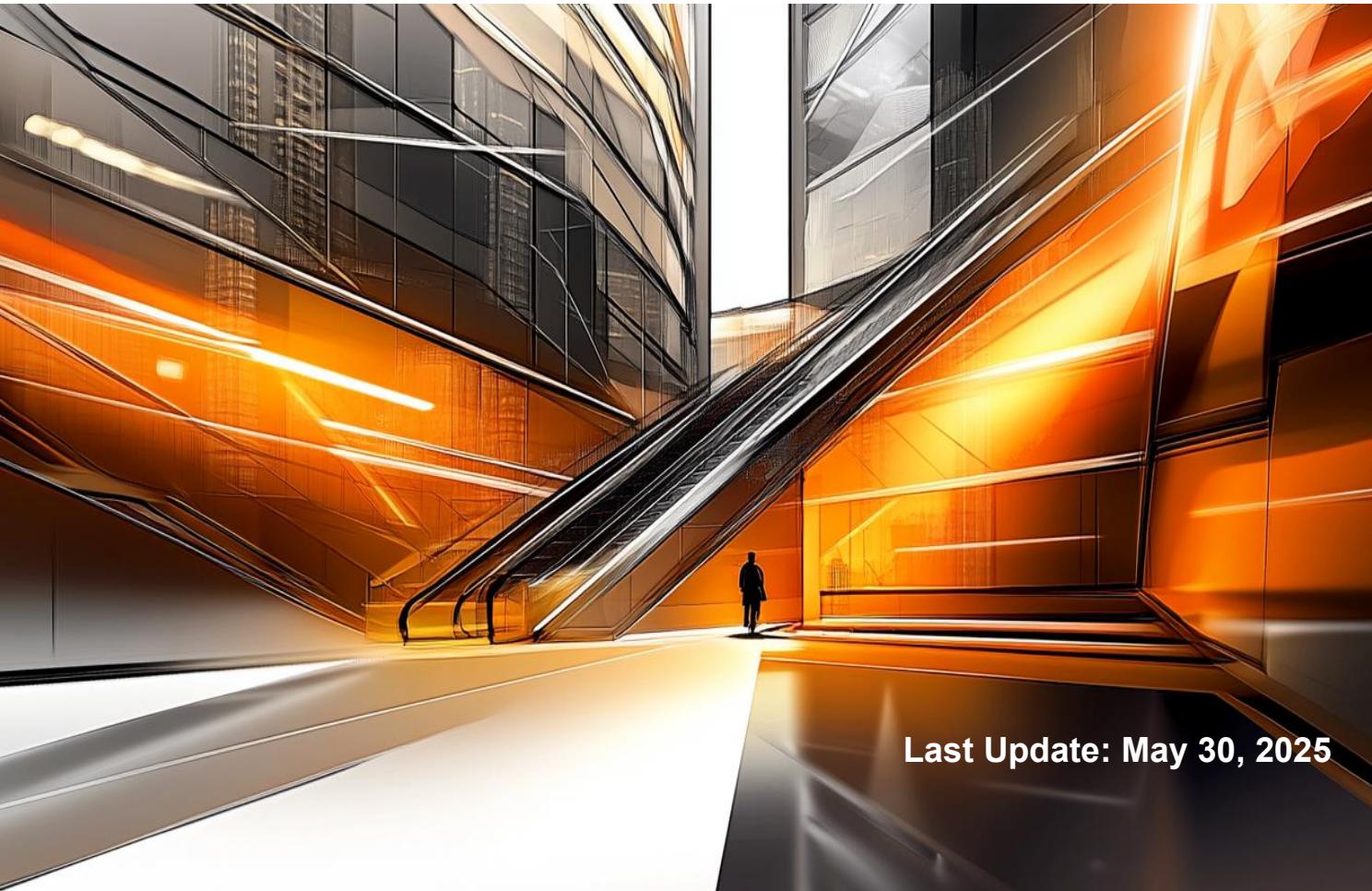




AUTOTRIAL AI

FAQ

Invitation to Test Drive Strategy AI



Last Update: May 30, 2025

Table of Contents

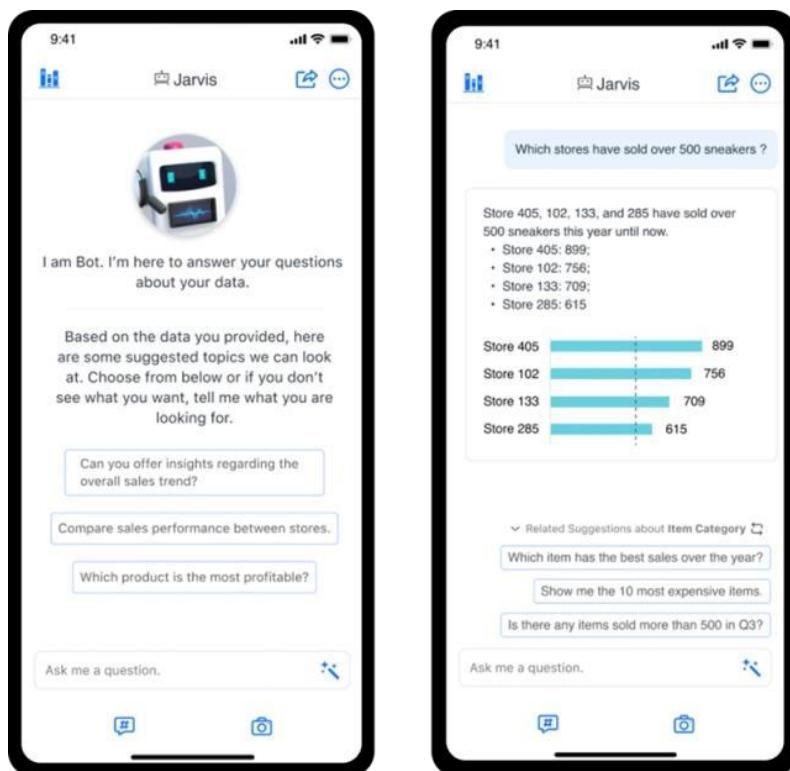
What is Strategy AI and AUTOTRIAL?	11
What is included in my free AUTOTRIAL test drive?	14
How do I sign up for an AUTOTRIAL test drive?	15
How can I login and run dashboards?	15
How do I obtain AI insights using Auto Answers?	17
How do I instantly create a dashboard page using Auto Dashboards?	19
How 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?

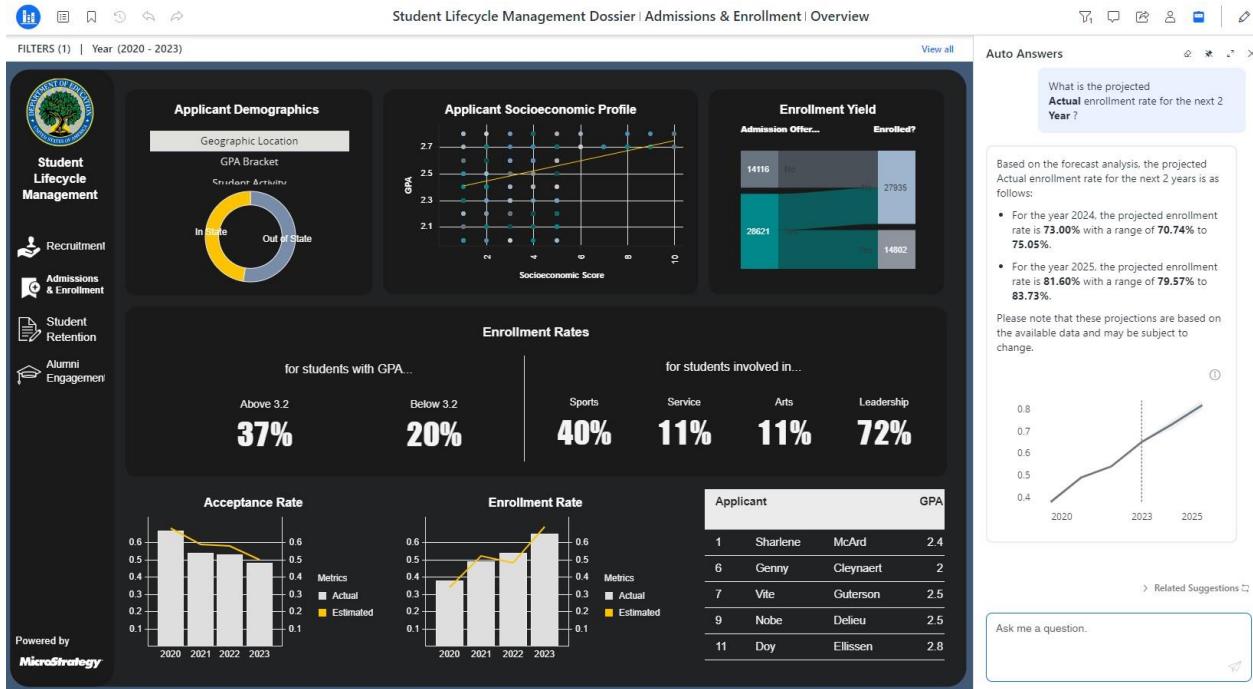
As a valued Customer, Prospect, or Partner, we invite you to embark on a test drive of Strategy AI. Join us in this immersive opportunity to explore and evaluate the transformative impact of Strategy AI firsthand.

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

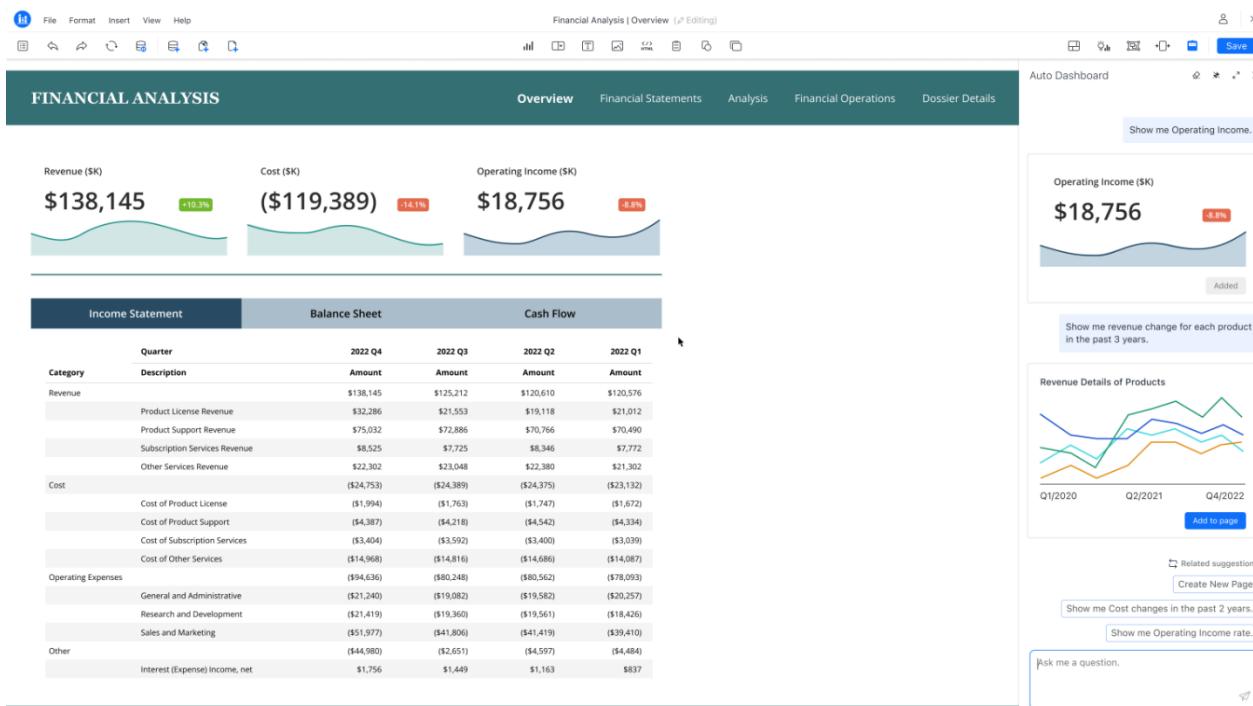
Auto Bot. Strategy's custom bots make it super easy for literally anyone to ask and answer questions using simple natural language - right from where they work every day. Auto Bots are super easy to build and deploy so that you can put them anywhere they are needed such as embedded in your company portal, 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

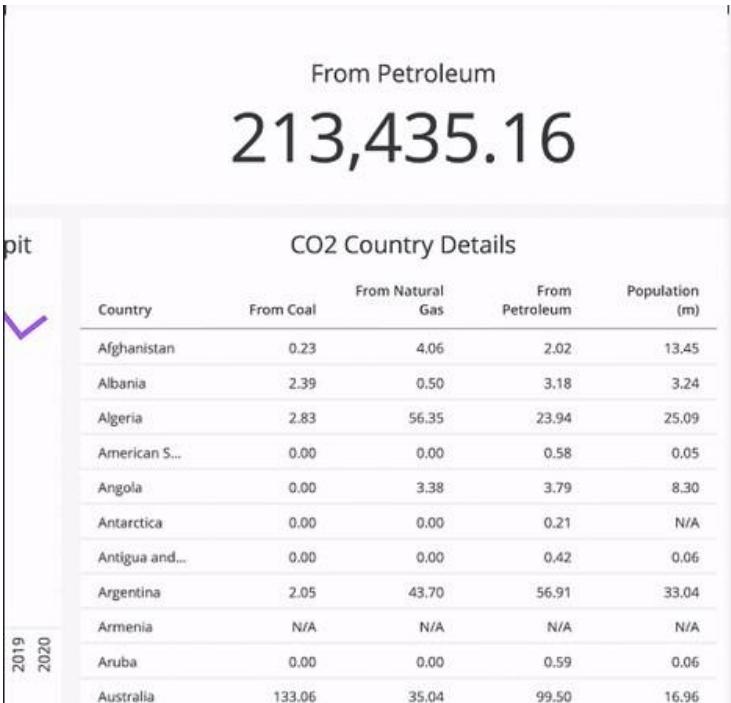
Season	Age Group	Total Sales
Winter	18-34	50000
Spring	35-54	48000
Summer	35-54	47000
Fall	18-34	46000
Winter	55+	44000
Spring	18-34	43000

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_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
    ORDER BY
        total_sales DESC
    LIMIT 10
)
```

✓ Inserted Undo Copy

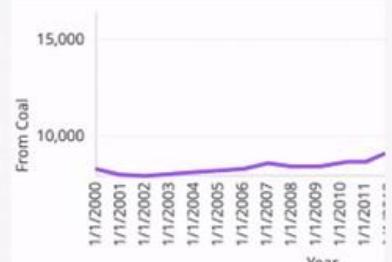
Advanced Analytics with AI. Revolutionize decision-making with an AI chatbot for advanced analytics. Automatically provide precise forecasting, allowing users to better anticipate market trends and optimize future strategy. Enable key driver analysis to unravel the complex web of factors that influence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



what is the forecasted From Coal for the next 2 years?

The forecasted 'From Coal' for the next 2 years is as follows:

- For the year 2021, the forecasted value is approximately **14,763.40K**, with a confidence interval between **14,105.17K** and **15,452.88K**.
- For the year 2022, the forecasted value is approximately **15,377.66K**, with a confidence interval between **14,425.84K** and **16,389.72K**.



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?

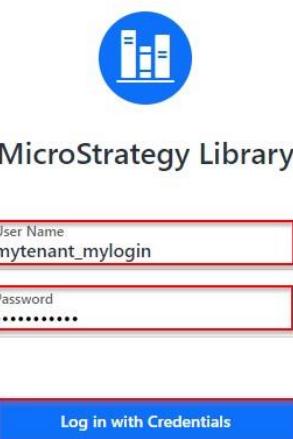
To receive your exclusive invitation, reach out to your dedicated Strategy Account team. Login details for you and your colleagues are promptly delivered via email from **autotrial.Strategy.com**.

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**.



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 image shows the MicroStrategy Library dashboard library. At the top, there are navigation icons and a search bar. Below is a section titled "All (11)" showing a grid of 11 sample dashboards. The dashboards are categorized by industry: TECHNICAL (Auto Assistant Adoption), BUSINESS (Call Center Management, Office Royale Sales, CPG Sales Enablement, Financial Analysis, Human Resources Analysis, Marketing Campaigns, Auto Generated Dossier, Retail Store Performance, Big Data Analytics), and RETAIL (Auto Generated Dossier). Each dashboard has a thumbnail, a title, and update information below it.

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

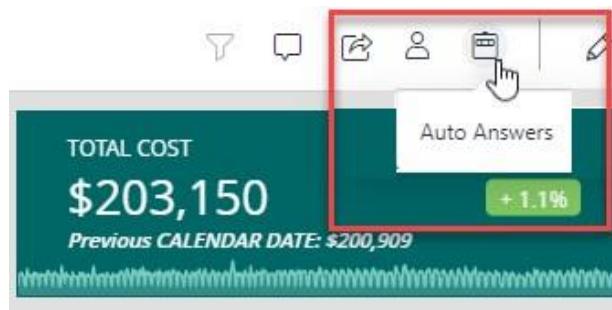
To learn more about Strategy and AI, take the following Strategy Education workshops:

[Accelerating Analytics with AI](#)

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

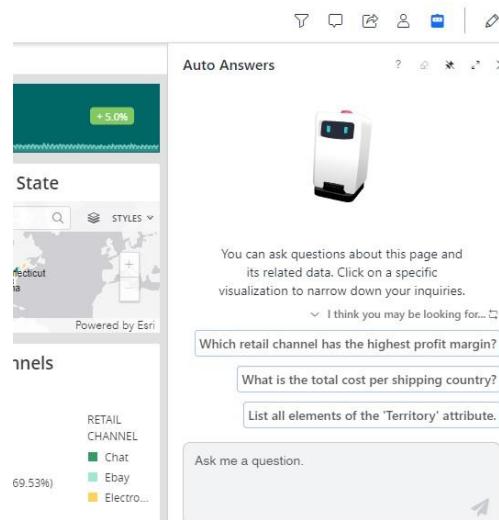
How do I obtain AI insights using Auto Answers?

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



US Sales Regions by State

- 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.

The screenshot shows two separate instances of the Auto Answers interface. The left instance has a question "What are my top sellers in accessories?" and a response listing top sellers with their unit counts. The right instance has a question "Which account type has the highest sales of accessories?" and a response with a bar chart and text summary.

Auto Answers

What are my top sellers in accessories?

Your top sellers in accessories are as follows:

- NEMICHAND JEWELS Pur - 32,098 units sold
- Heartlink BTS Bangtan - 19,150 units sold
- HR SALES Jewellery - 18,596 units sold
- ACCESSHER Set Of 2 M - 16,629 units sold
- AirCase Premium Mess - 14,647 units sold
- PC Jeweller The Jenu - 12,132 units sold
- VILLS LAURRENS HMTY - 9,418 units sold
- CARIZO Luggage Dou - 6,283 units sold
- BTS Pink Dimond04 R - 5,787 units sold
- ZENEME Designer Pear - 5,666 units sold

These are the top-selling accessories based on the number of units sold. NEMICHAND JEWELS Pur is the best-selling accessory with 32,098 units sold, while ZENEME Designer Pear is the least-selling accessory with 5,666 units sold.

Auto Answers

Which account type has the highest sales of accessories?

The account type with the highest sales of accessories is **Approved Resale**. The total sales for this account type is **\$15,586,091**.

*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.

A tooltip labeled "Interpretation" points to a small icon in the top right corner of a response box. The response box contains the same text as the previous screenshot: "The account type with the highest sales of accessories is **Approved Resale**. The total sales for this account type is **\$15,586,091**".

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

The screenshot shows the AI interpretation interface. At the top, it says "Interpreted as:" followed by a detailed description: "Identify the account type with the highest total sales in the main category of accessories, sorted by total sales in descending order". Below this is the "Components:" section, which includes "STEP1" (with components: MAIN CATEGORY (Accessories) and ACCOUNT TYPE), "Total_Sales" (calculated as Sum(SALES)), and a "FINAL TABLE" (with components: STEP1.ACCOUNT TYPE, STEP1.Total_Sales, and STEP1.Total_Sales [Highest 1]). There is also a "View Less" link.

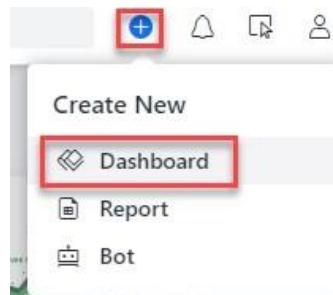
Viewing the interpretation affirms the logic and criteria used to generate the response, which is especially helpful if your question contained any ambiguities.

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 **Autorial**

Add Data Select Template

Certified Only

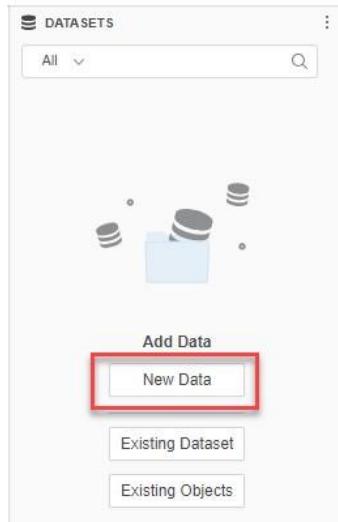
	Name	Certified	Owner	Date Modified	Date Created
<input type="checkbox"/>	A.Human_Resources_An...		Administrator	2024-04-12 07:38:07	2021-10-02 23:06:19
<input type="checkbox"/>	A.Marketing_Campaign_...		c628_prd_admi...	2024-04-12 07:37:33	2024-01-17 12:43:30
<input type="checkbox"/>	A.Marketing_Campaigns...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

Autorial > 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.

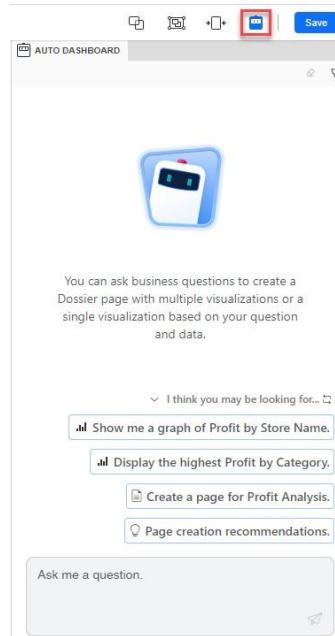


- 2) In the New Dataset window, click **File from Disk**, and then click **Choose files**.
- 3) Navigate to your file and select it, click **Open**, and then click **Import**.

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.

Show me a graph of Revenue by Category.

Add to page

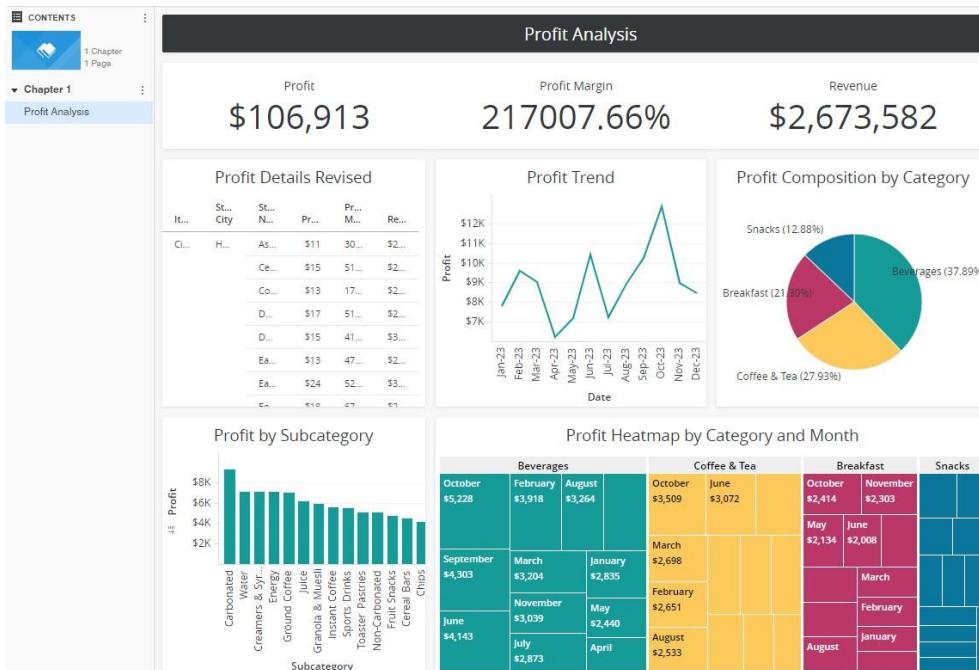
The Revenue by Category graph shows the following categories and their corresponding revenue:

- Beverages: \$1,424,649
- Breakfast: \$528,644
- Coffee & Tea: \$478,692
- Snacks: \$241,597

This graph provides a visual representation of the revenue generated by each category.

Category	Revenue
Beverages	\$1,424,649
Breakfast	\$528,644
Coffee & Tea	\$478,692
Snacks	\$241,597

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



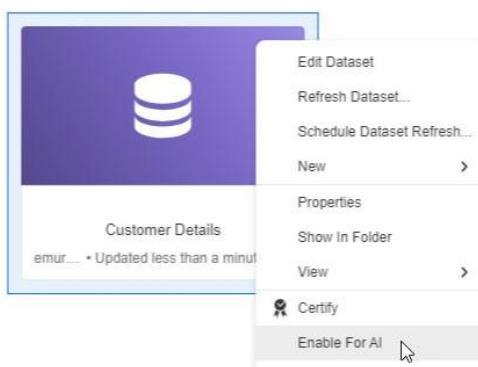
How can I create my own standalone AI bot?

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.

The screenshot shows the Data Wrangling interface with a sample dataset named "call_center_data.xlsx". The interface includes a toolbar with functions like "Delete Column", "Fill Down", "Blank Down", and "Remove Row(s) Where Cell Is Empty [Call ID]". A "Script" tab is open, showing some code. The main area displays a table with columns: Agent ID, Agent Name, Call ID, Customer ID, Product, Call Start Time, Call End Time, First Call Resolution, Customer Satisfaction Score, and Call To. The "Call ID" column is currently selected. A "Numeric Selector" tool is being used to filter or manipulate the data. The bottom of the screen shows a page navigation bar indicating 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.

The screenshot shows the 'New AI Dataset Collection' interface. On the left, there's a sidebar with 'DATA' and 'EDITOR' tabs. Under 'DATA', there are sections for 'Call Center' (with 'Call Center Location' selected) and 'Customer Details'. A 'Link Attributes' dialog is open over the main preview area, titled 'Add A Link... Show Attribute Forms'. It contains a table with two rows: 'Call Center Location' and 'Call Center'. The main preview area shows a table titled 'Data Preview 1' with columns 'Call Center Location' and 'Points Earned'. The data includes rows for various US states with their respective point values.

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

5 Create and customize the bot using an intuitive interface.

The screenshot shows the 'New Bot' interface. On the left, there's a preview window titled 'New Bot' showing a purple circular icon with a white robot head and the text 'Hello! I'm New Bot, your virtual assistant. How can I guide you today?'. Below this, there's a section for suggested topics with three examples: 'Which airline has the highest average delay?', 'How many flights were delayed each month?', and 'Which brand generates the highest revenue?'. At the bottom of this section is a text input field 'Ask me a question' with a small note: 'AI can make mistakes. Consider checking important information for accuracy.' On the right, there are several configuration panels: 'General' (with 'BOT NAME' set to 'New Bot' and 'Active' toggle on), 'BOT GREETING' (with a text area containing the greeting message), 'PANEL THEME' (set to 'Light'), 'QUESTION INPUT' (with 'Enable question suggestions (up to 5)' toggle on and a dropdown for 'Automatically generated suggestions' set to '3').

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.

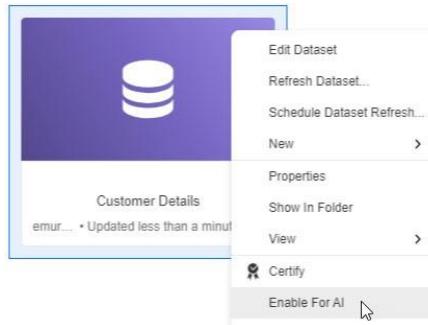
Preprocessing and enriching data: AI-Enabled Datasets and AI Dataset Collections

AI-Enabled Datasets

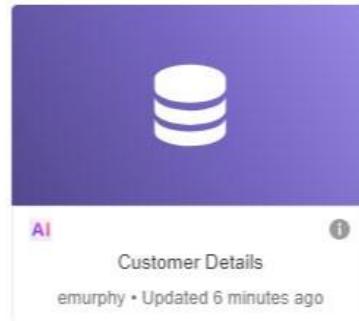
Once you choose a dataset and ensure it's clean, enable the dataset for AI to use it in a bot. When you enable a dataset for AI, Strategy then pre-processes and enriches it to make it more usable by AI models. For example, descriptions and context are added to the data, and important entities like names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

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

2 selected

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 shows the 'New AI Dataset Collection' interface with the title bar 'New AI Dataset Collection (Advanced Data Editing)'. The top right features 'Save' and 'Cancel' buttons. On the left, a 'DATA' sidebar lists various objects like 'Call Center', 'Agent ID', 'Agent Name', etc. A 'Link Attributes' dialog box is open, showing a link between 'Call Center Location' and 'Call Center'. The main area displays 'Data Preview 1' with a table of data:

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.

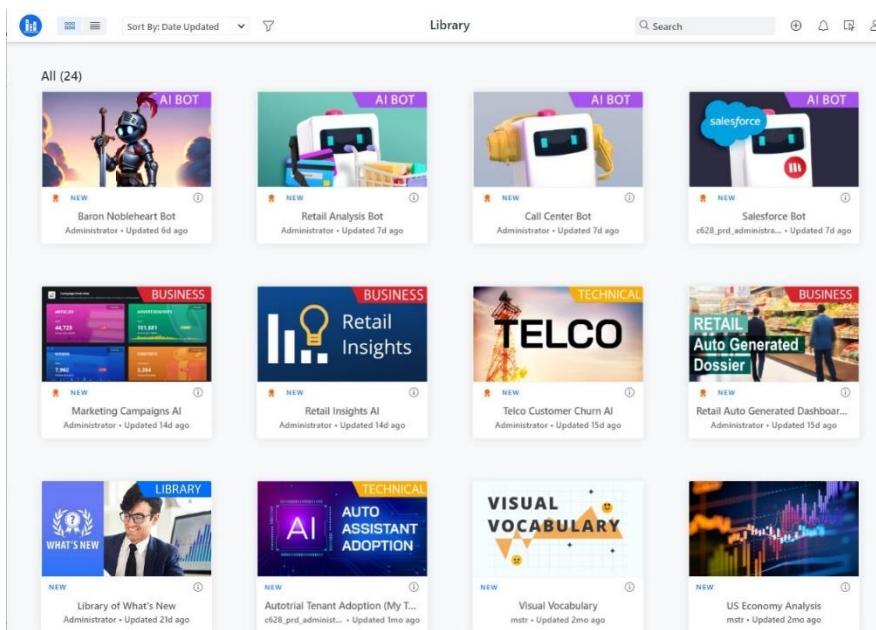
Access Library

- 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/>

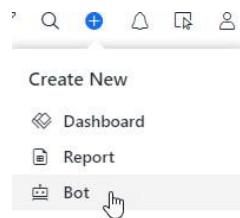
The Library login page displays.

- 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.

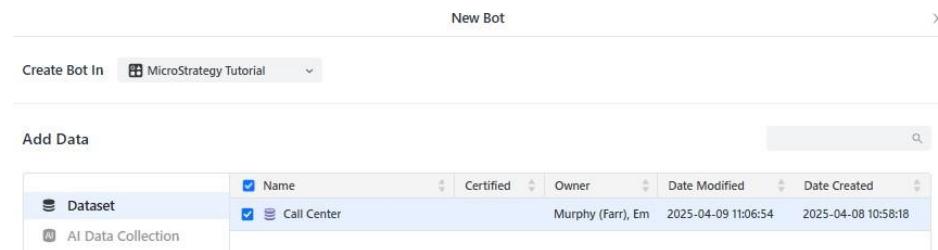


Create an AI Dataset Collection

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

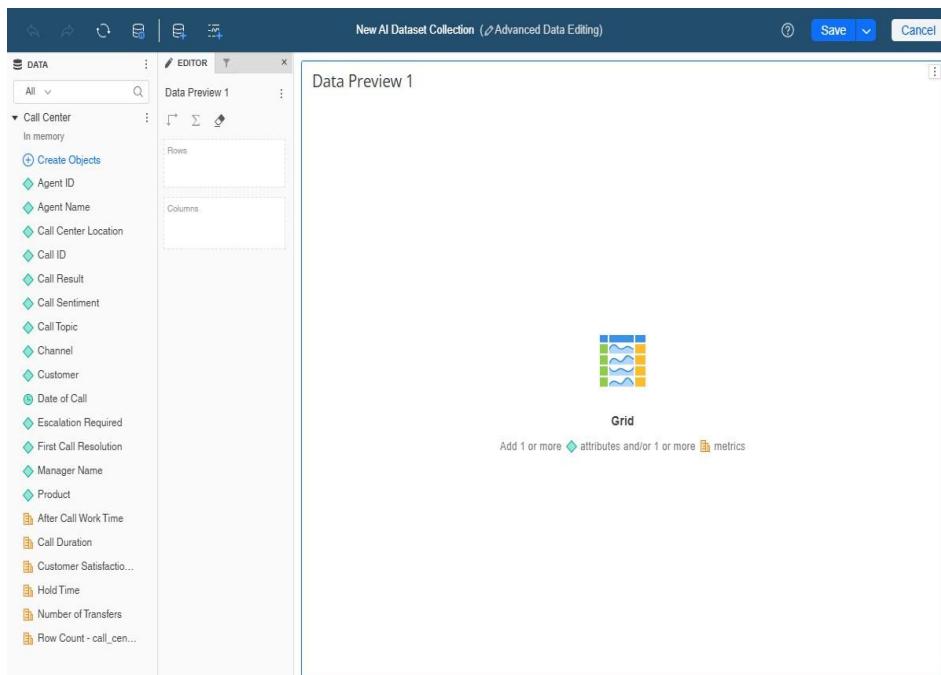


- 2 In the **Create Bot In** drop-down list, ensure the **Tutorial** project is selected.
- 3 The datasets you want to use are AI-Enabled but are not yet part of an AI Dataset Collection. Ensure **Dataset** is selected in the left pane, then select the check box for the **Call Center** dataset. Click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



The screenshot shows the 'New Bot' dialog box. At the top, it says 'Create Bot In' and has a dropdown set to 'MicroStrategy Tutorial'. Below that is a table titled 'Add Data' with two rows. The first row is highlighted in blue and labeled 'Dataset'. It contains columns for Name (with 'Call Center' checked), Certified (unchecked), Owner (Murphy (Farr), Em), Date Modified (2025-04-09 11:06:54), and Date Created (2025-04-08 10:58:18). The second row is labeled 'AI Data Collection' and is not checked. The table has a search bar at the top right.

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



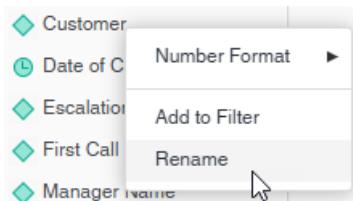
The screenshot shows the 'New AI Dataset Collection' editor. The title bar says 'New AI Dataset Collection (Advanced Data Editing)'. The left sidebar is labeled 'DATA' and lists various datasets like 'Call Center', 'Agent ID', etc. The main area is titled 'Data Preview 1' and shows a 'Grid' view with a small icon. Below the grid, there's a note: 'Add 1 or more  attributes and/or 1 or more  metrics'.

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.

The screenshot shows the Data Preview 1 window. On the left, the Data panel lists attributes: Customer, Date of C, Escalation, First Call, and Manager. The Customer attribute is highlighted with a green border. The Editor panel shows a grid with one row labeled 'Customer'. The Data Preview 1 panel on the right shows a list of customer IDs: 174, 222, 492, 757, 1435, and 1498.

- 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.

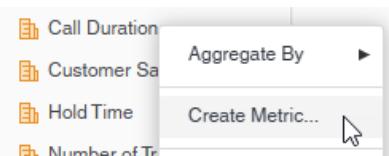
The screenshot shows the Data Preview 1 window after renaming. The Data panel now lists attributes: Customer ID, Date of C, Escalation, First Call, and Manager. The Customer ID attribute is highlighted with a green border. The Editor panel shows a grid with one row labeled 'Customer ID'. The Data Preview 1 panel on the right shows a list of customer IDs: 174, 222, 492, 757, and 1435.

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.

Metric Name: Metric Options

Formula

+ - × ÷ () < >

Sum([Call Duration]){\~+}

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

The screenshot shows the Metric Editor interface. On the left, there's a sidebar titled 'Data' with a dropdown set to 'All'. Below it is a list of metrics: Customer, Date of Call, Escalation Required, First Call Resolution, Manager Name, Product, After Call Work Time, Call Duration (which is selected and highlighted in blue), and Customer Satisfaction... On the right, the 'Metric Name' field contains 'New Metric'. The 'Formula' field has '+ - × ÷ () <>' above it, with a red box highlighting the minus sign. Below the formula is a text input field containing '[Call Duration]-'. At the bottom right of the editor are 'Metric Options', 'Clear', and 'Validate' buttons.

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

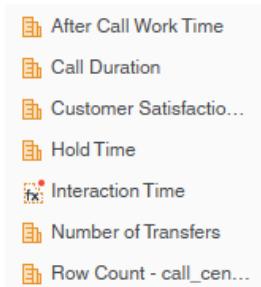
The formula bar shows '+ - × ÷ () <>' above the input field. The minus sign is highlighted with a red box. The input field contains '[Call Duration]-'.

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

The formula bar shows '+ - × ÷ () <>' above the input field. The input field contains '[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.



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.

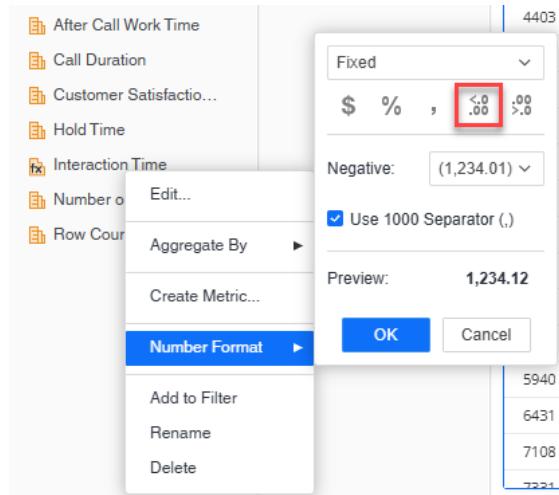
The screenshot shows the Data Preview 1 panel. On the left, there's an 'EDITOR' tab, a 'Rows' section containing 'Customer ID', and a 'Columns' section containing 'Call Duration', 'Hold Time', and 'Interaction Time'. To the right is the 'Data Preview 1' table with the following data:

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**.



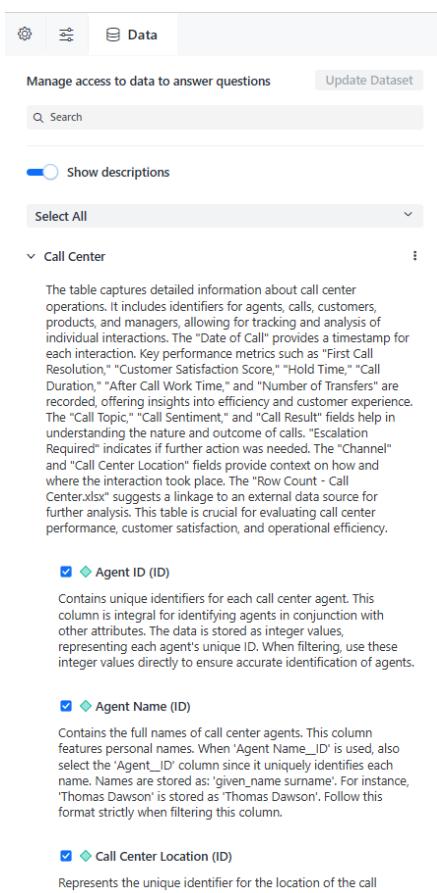
You can verify your changes in the preview grid, where the Interaction Time values now display with two decimals.

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.

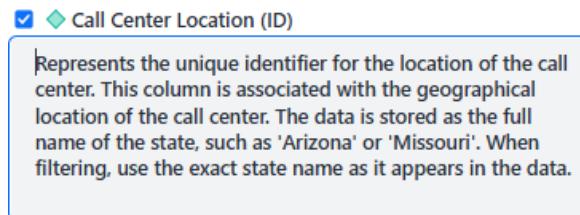


The screenshot shows the 'Data' panel of the New Bot window. At the top, there are buttons for 'Manage access to data to answer questions' and 'Update Dataset'. Below that is a search bar and a 'Show descriptions' toggle switch. A dropdown menu is open, showing 'Select All' and a collapsed section for 'Call Center'. The 'Call Center' section contains a detailed description of the table's purpose and structure. Below the table, three columns are listed with their respective descriptions:

- 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.

- 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**.

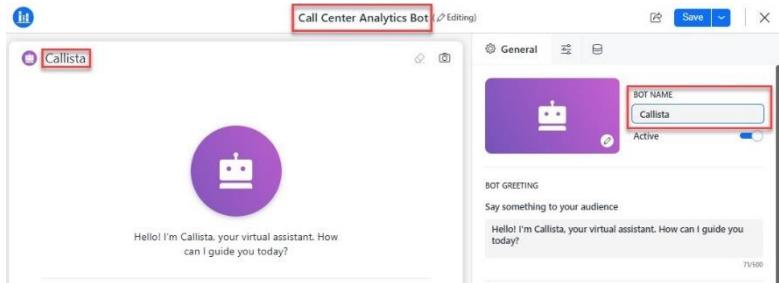
Customize the bot's general settings

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

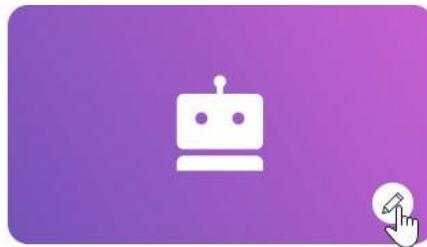
Adjust the bot name, image, and greeting

- 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**.

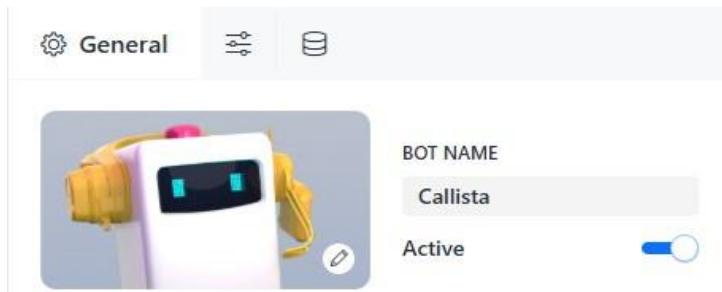
The name in the chat panel changes, but the object name at the top of the Editor remains the same.



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



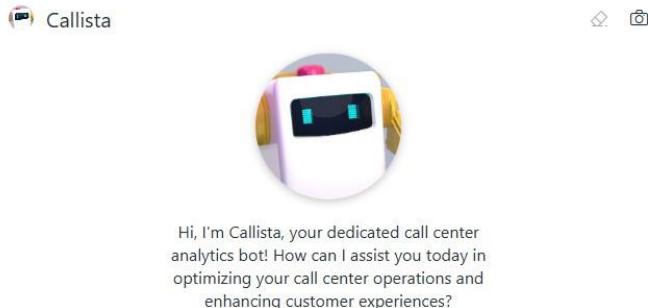
- 4 In the Change Cover Image window, you can add a custom image using a URL or choose from the sample images. Select **Auto with a yellow headset** from the sample images, and click **Save**.



- 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



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

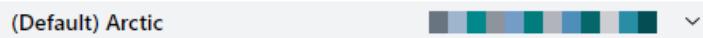


- 8** Add the HEX numbers listed below:

- 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.



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.

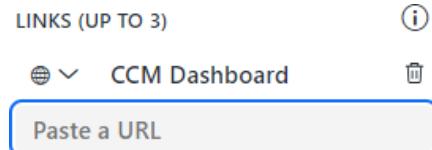
Add links

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.



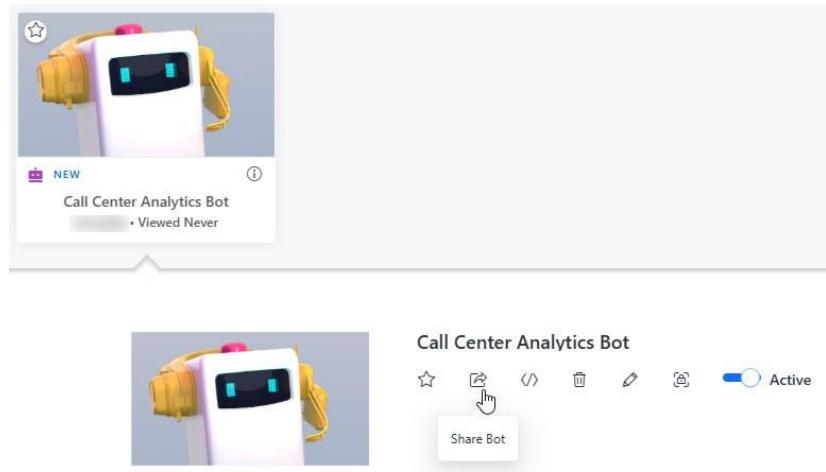
18 Click **Save**.

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).



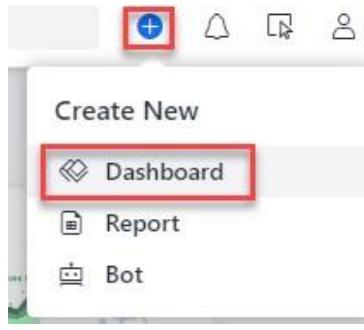
Can I report on a data warehouse schema (semantic graph)?

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**.

Name	Certified	Owner	Date Modified	Date Created
Flight Data	Aatif Rahim	2024-02-26 04:13:06	2024-02-26 04:13:06	
DGT_Traffic_Information	David Ciruelos	2024-02-23 07:10:18	2024-02-23 05:28:00	
Cube Memphis Discounts	Administrator	2023-12-08 04:55:23	2009-05-13 14:29:48	
Profit and Revenue Cube	Administrator	2023-12-08 04:54:06	2010-02-22 10:35:46	
Actual vs Forecast Perfo...	Administrator	2023-12-08 04:54:06	2009-04-15 16:24:53	
Intelligent Cube - Inven...	Administrator	2023-12-08 04:53:55	2011-10-24 06:14:53	
Intelligent Cube - All pr...	Administrator	2023-12-08 04:53:55	2009-01-20 08:01:27	
Intelligent Cube - Dyna...	Administrator	2023-12-08 04:53:55	2009-03-03 08:47:55	
Intelligent Cube - Drillin...	Administrator	2023-12-08 04:53:55	2009-01-20 07:44:15	
Intelligent Cube - Geogr...	Administrator	2023-12-08 04:53:55	2011-10-24 10:49:37	
Intelligent Cube - Incom...	Administrator	2023-12-08 04:53:55	2011-10-24 11:33:00	
Intelligent Cube - KPI List	Administrator	2023-12-08 04:53:55	2011-10-24 05:46:56	

- 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

Clear All Selections (7)

Region
Call Center
Country
Category
Subcategory
Year
Month

?

x

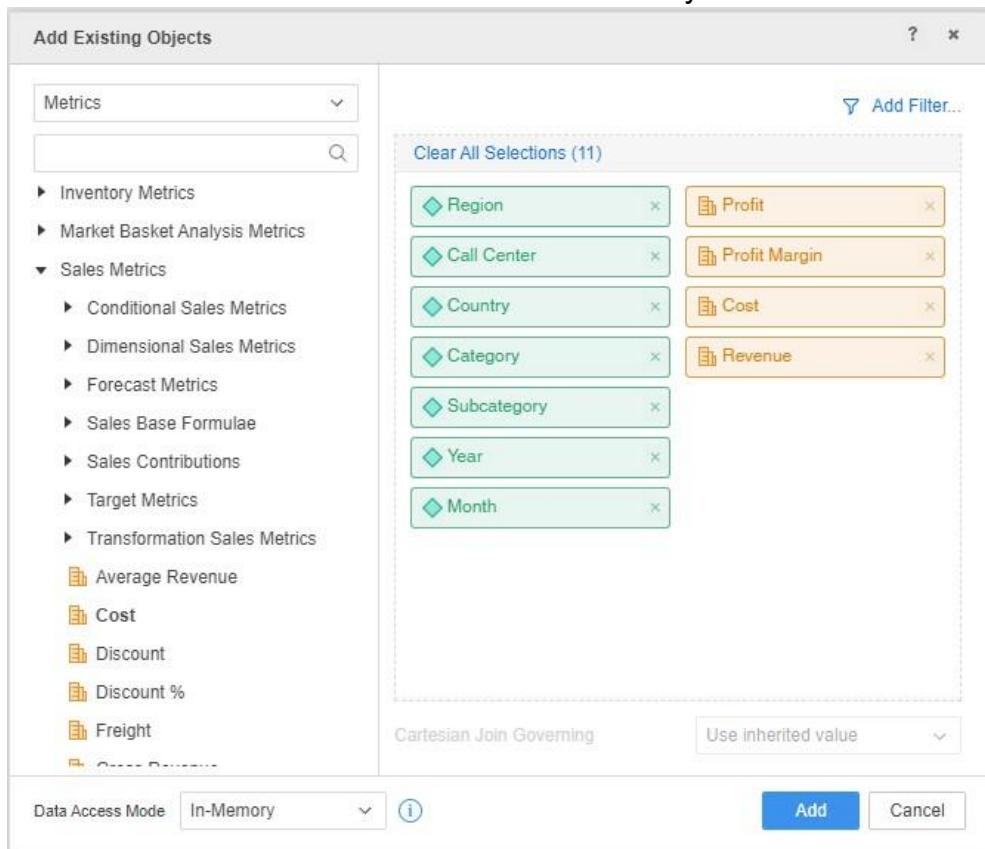
Add Filter...

Customers

Geography

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

- 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**.

The screenshot shows the Power BI Editor interface. On the left, there's a 'CONTENTS' sidebar with 'Chapter 1' expanded, showing '1 Chapter' and '1 Page'. Below it is a 'DATA SETS' pane with 'All' selected, showing a list of attributes: Call Center, Category, Country, Month, Region, Subcategory, Year, Cost, Profit, Profit Margin, Revenue, and Row Count. In the center, there's a 'EDITOR' tab with 'Visualization 1' selected. The visualization area has three empty boxes labeled 'Rows', 'Columns', and 'Metrics'. Below these is a 'Grid' icon with the text 'Add 1 or more attributes and/or 1 or more metrics'. On the right, a 'AUTO DASHBOARD' panel features a blue robot icon at the top. Below it is a message: 'You can ask business questions to create a Dossier page with multiple visualizations or a single visualization based on your question and data.' Underneath are several suggestions: 'I think you may be looking for...', 'Show me a graph of Profit by Month.', 'Display the highest Profit by Country.', and a highlighted suggestion 'Create a page for sales analysis.' (which is also mentioned in the text below). At the bottom of the dashboard panel is a 'Page creation recommendations.' section and a 'Ask me a question.' input field.

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

The screenshot shows a 'Sales Analysis Page' dashboard. At the top, there are four summary values: Cost (\$29,730,085), Profit (\$5,293,624), Profit Margin (15.11%), and Revenue (\$35,023,708). Below these are four visualizations: 'Revenue by Category' (bar chart showing Electronics as the largest category), 'Revenue Trend' (line chart showing revenue increasing from 2020 to 2022), 'Revenue by Country' (pie chart showing USA at 88.86% and Web at 11.14%), and 'Profit Trend' (line chart showing profit increasing from 2020 to 2022). Below the visualizations are two tables: 'Sales Details' and 'Call Center'. The 'Sales Details' table lists items with their costs, profits, profit margins, and revenues. The 'Call Center' table lists regions with their costs, profits, profit margins, and revenues. A sidebar on the right shows a 'Related Suggestions' section with options like 'Show me a graph of Revenue by Category.', 'Display the lowest Cost by Subcategory.', 'Create a page for regional analysis.', and 'Page creation recommendations.' A message in the sidebar says 'A page named "Sales Analysis Page" was created.'

- 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.

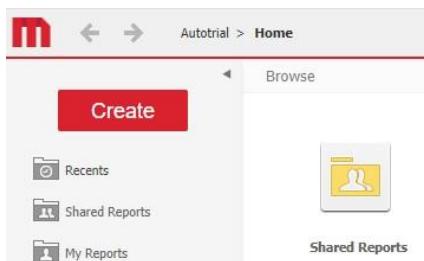
- To access Strategy Web, go to:
<https://autotrial.Strategy.com/Strategy/servlet/mstrWeb>

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

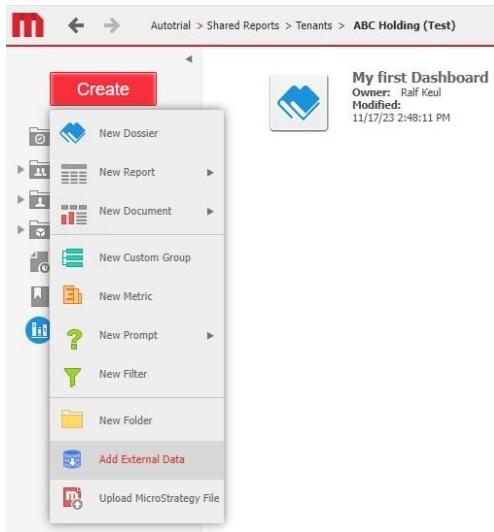
- 1) Log in using your AUTOTRIAL credentials.
- 2) Click the **Autotrial** project.



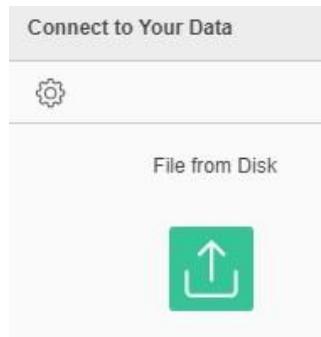
- 3) Click **Shared Reports**.



- 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

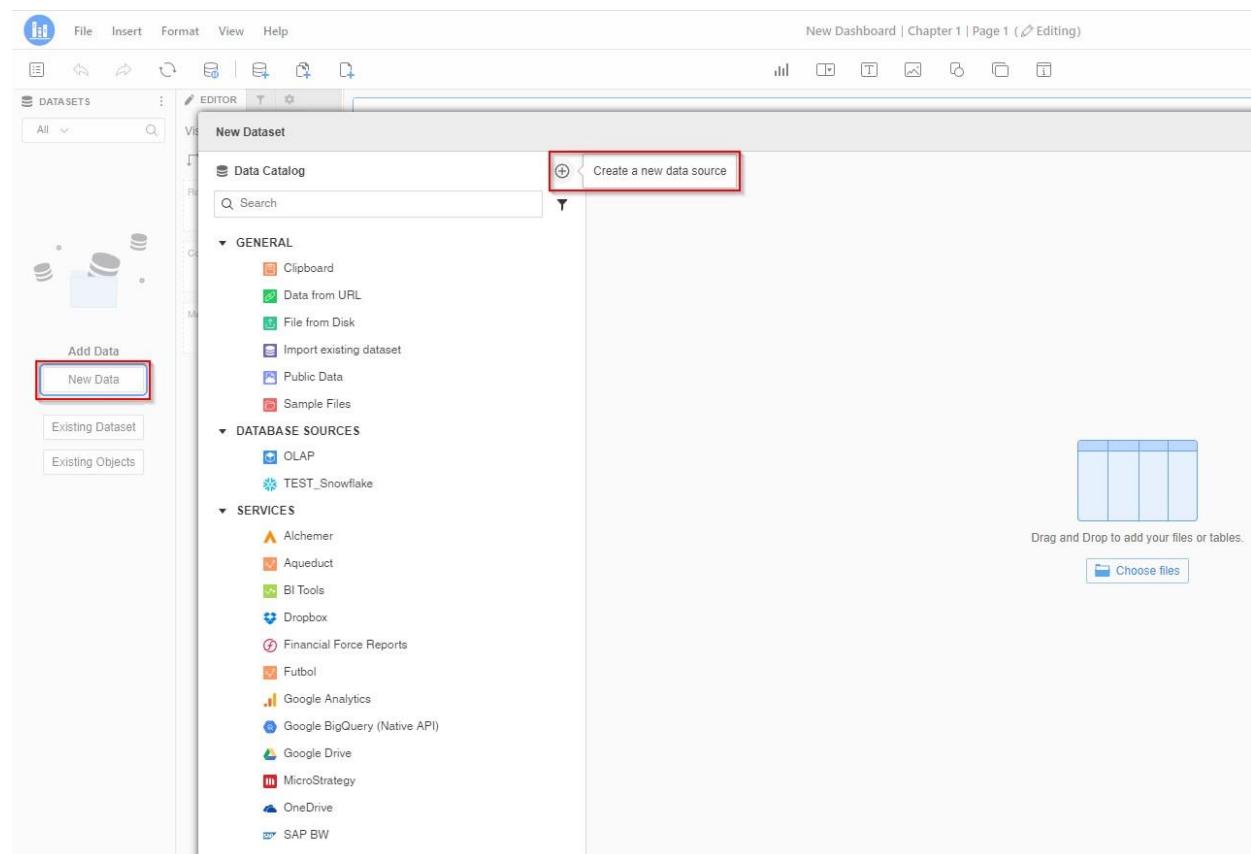
- A dedicated empty Project Greenfield_<Tenant> that can be connected to a customer database or a Strategy Database with customer data, and or
- A dedicated Strategy Tutorial Project copy Tutorial_<Tenant> that represents a sample Retail Project on top of a Postgres Sample Retail Warehouse Database. 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.

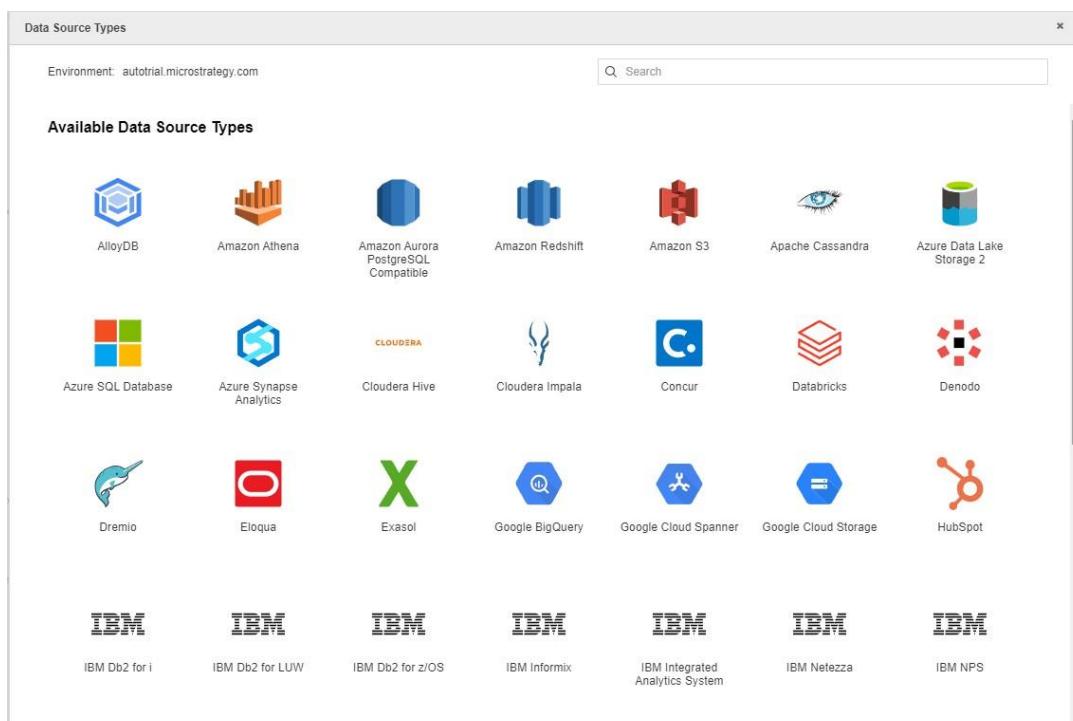
Can I connect to my own databases?

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.

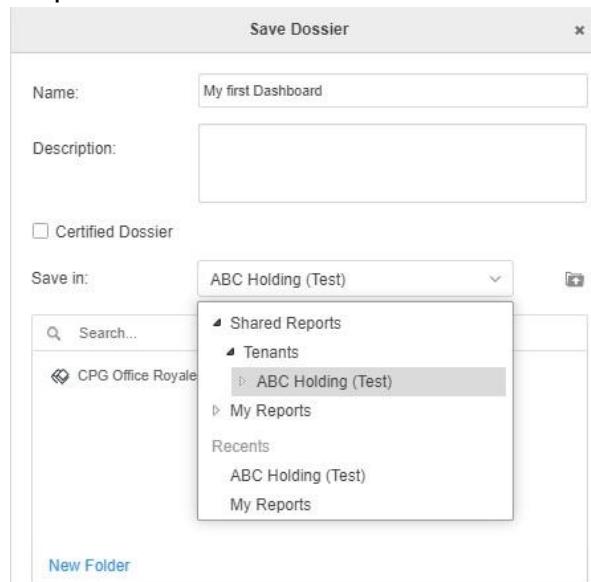
Find further information on the Creation of Data Sources here:

https://www2.Strategy.com/producthelp/Current/Workstation/enus/content/create_edit_data_sources.htm

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.

MicroStrategy AUTOTRIAL ALERT - Users exceeding Usage Threshold - ABC (Demo only) - Message (HTML)

File Message Help

MicroStrategy AUTOTRIAL ALERT - Users exceeding Usage Threshold - ABC (Demo only)

A autotrialoperations
To [REDACTED]

Reply | Reply All | Forward | ...
Mon 12/4/2023 8:05 PM

Hello [REDACTED]

The following users surpassed their individual 30 or 365 day periods "per user" usage thresholds for AI Questions as per the limits you had set. This could have triggered the removal of the privilege to ask AI Questions for those users until their usage decreases below the specified threshold for the respective time frame.

Please rest assured this Alert Email has been sent to you solely to demonstrate the capabilities of MicroStrategy to provide such transparency via Email. No action will be taken nor will any cost be incurred.

This message was sent to you as you are listed as Main Customer Contact for this AUTOTRIAL tenant CA. We are delighted to see you leveraging MicroStrategy AI to address business inquiries, enhancing your business, and achieving value.

Tenant Short	User Name	User Login	User Email	AI Questions Threshold 30d	AI Questions Usage 30d	AI Questions Alert 30d	AI Questions Threshold 365d	AI Questions Usage 365d	AI Questions Alert 365d
ABC	Peter Miller	abc_peter	peter@abc.com	100	101	1	600	101	0

You can review your AI Questions usage in this dossier: [Autotrial Tenant Adoption \(My Tenant\)](#)

This message has been generated and sent to you by using MicroStrategy REST APIs in a Python Automation on MicroStrategy Platform Analytics. MicroStrategy AUTOTRIAL at your service

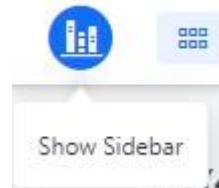
In the AUTOTRIAL environment, this is in place to demonstrate the email alert functionality, so the User remains fully AI enabled and no costs occur. Once the user falls back under the 30-day threshold, the main contacts receive another email alert that user is back below the threshold. In a productive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

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

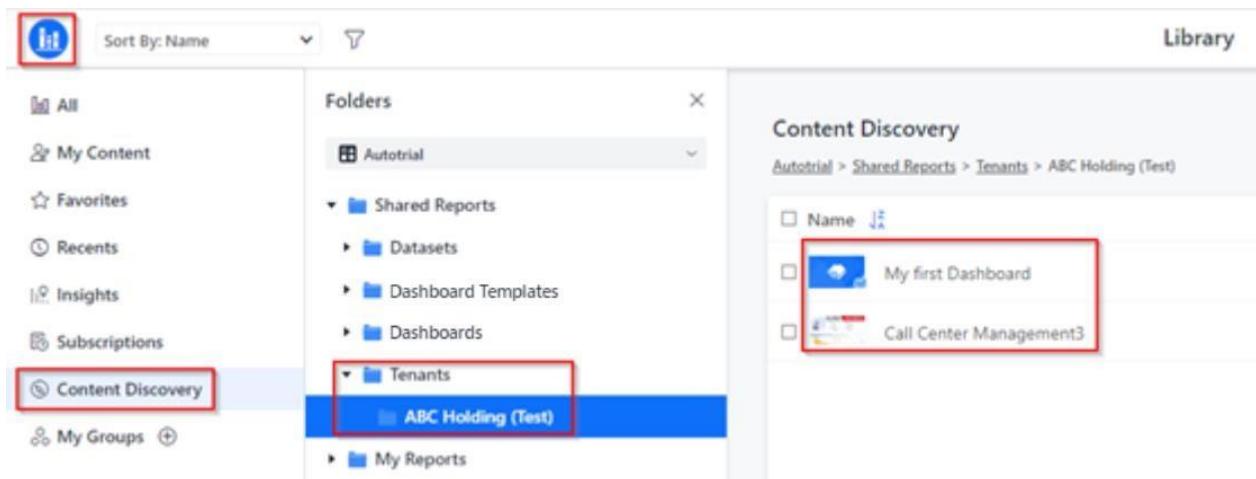
Your tenant peers can access a shared dashboard through Content Discovery or by email.

To access a dashboard through Content Discovery:

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



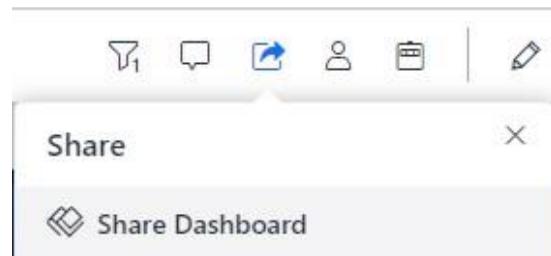
- 2) In the sidebar, click **Content Discovery**. In the Folders panel, navigate to the shared tenant folder under **Shared Reports\Tenants**.



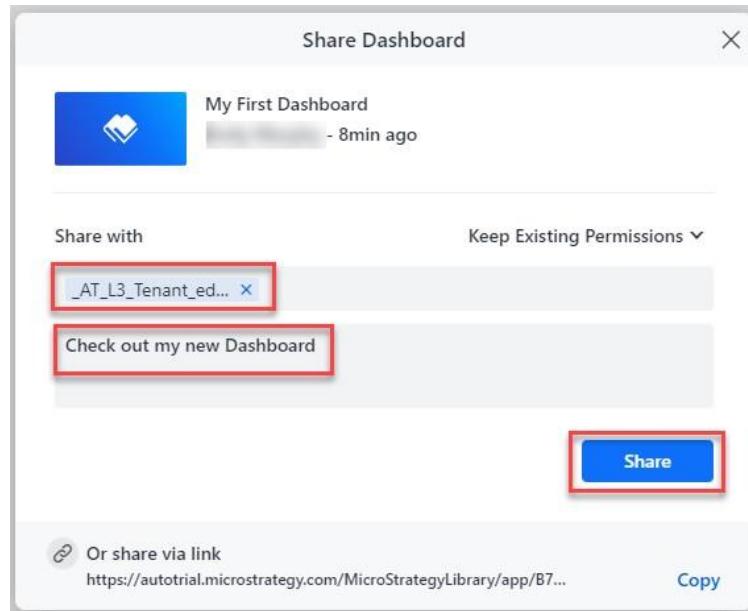
- 3) Click a dashboard in the Content Discovery area on the right to open it.

To share a dashboard via email:

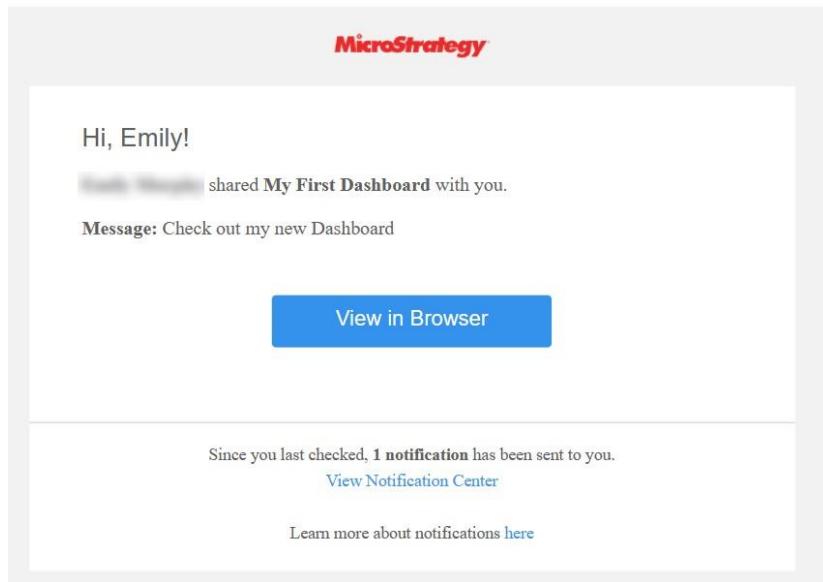
- 1) Open the dashboard you want to share, click the **Share** icon in the right of the toolbar, and then select **Share Dashboard**.



- 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.

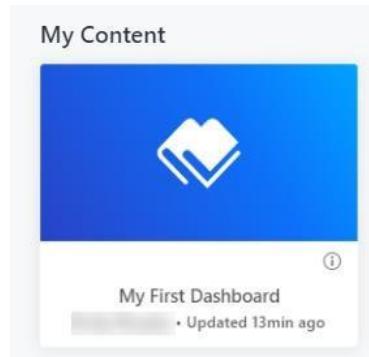


To add a shared dashboard to your Library:

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



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



Can I adjust the security access to an object (ACL)

For all Objects like Dashboards, Bots, Cubes, Security Filter etc. Account Control Lists

(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>.

The screenshot shows the 'Properties' dialog for an object named 'My first Dashboard'. The left sidebar lists categories: Bot, Dashboard, Call Center Management3, My first Dashboard, My second Dashboard, Folder, and Other. The 'Security Access' tab is selected. The main pane displays a list of users and their access levels:

User	Access Level
_AT_L3_Tenant_ABC	Custom
Albert Ans	View
Berta Bing	Modify
Caesar Cuong	FullControl

Below the list is a grid of permissions: Browse, Read, Use, Execute, Write, Delete, and Control. The 'OK' and 'Cancel' buttons are at the bottom right.

Can I create objects with HTML Tags?

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.

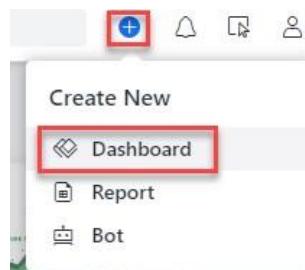
My data upload failed – Can the upload limit be increased?

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.

New Dashboard

Create Dashboard in Autotrial

Add Data Select T Certified Only

	Name	Certified	Owner	Date Modified	Date Created
<input type="checkbox"/>	A.Call_Center_Managem...		Administrator	2024-04-12 07:38:07	2021-10-02 22:43:56
<input type="checkbox"/>	A.Call_Center_S		Administrator	2024-04-12 07:37:28	2024-01-17 21:22:08

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!

