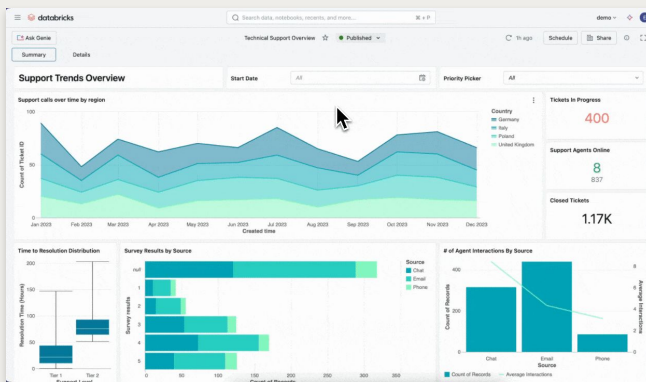# AI/BI
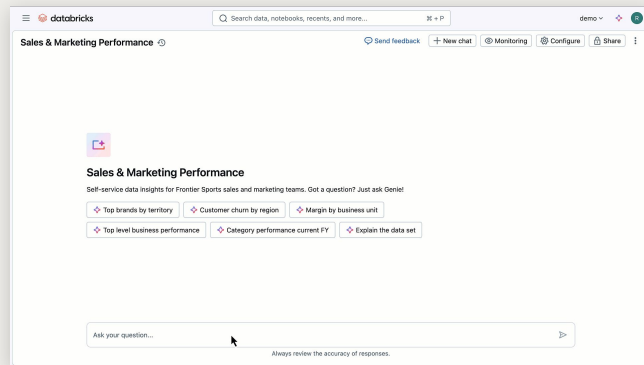# Genie

Aug 2025

Introducing

Databricks AI/BI

Intelligent analytics for everyone

Powered by Databricks SQL

Dashboards

Fast and secure visual insights for your entire organization

Genie

Talk with your data using natural language

Governed and secured with Unity Catalog

Agenda

- Motivation for Genie

- Genie Fundamentals

    - How to configure Genie

    - End user experience

    - How Genie learns over time
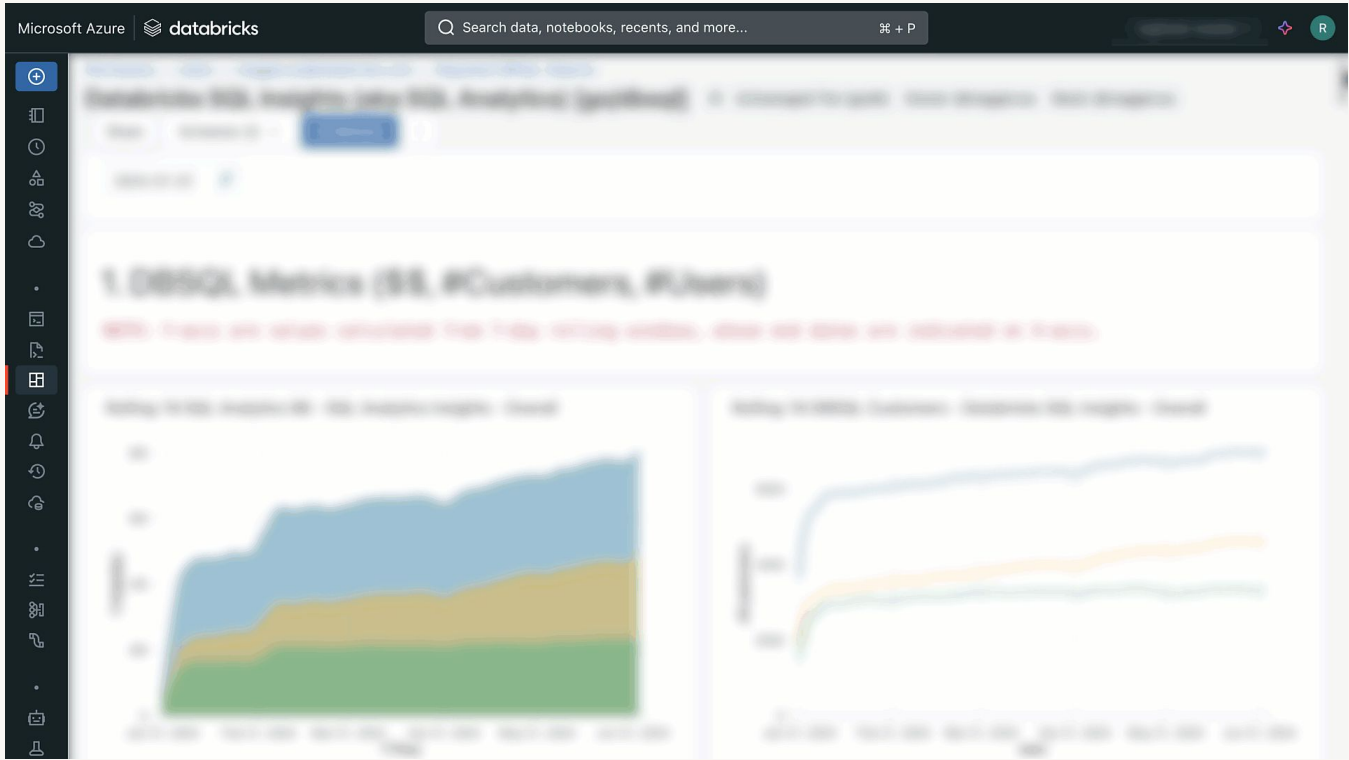
- Demo

Motivation for Genie
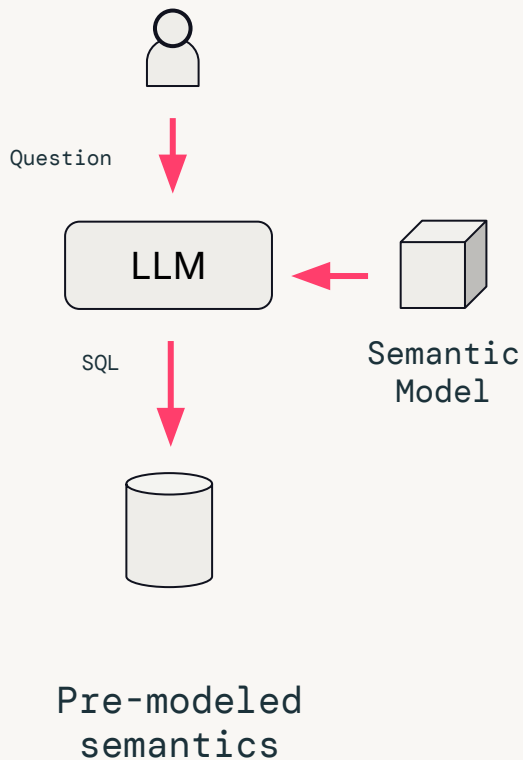
Our mission is to democratize data + AI
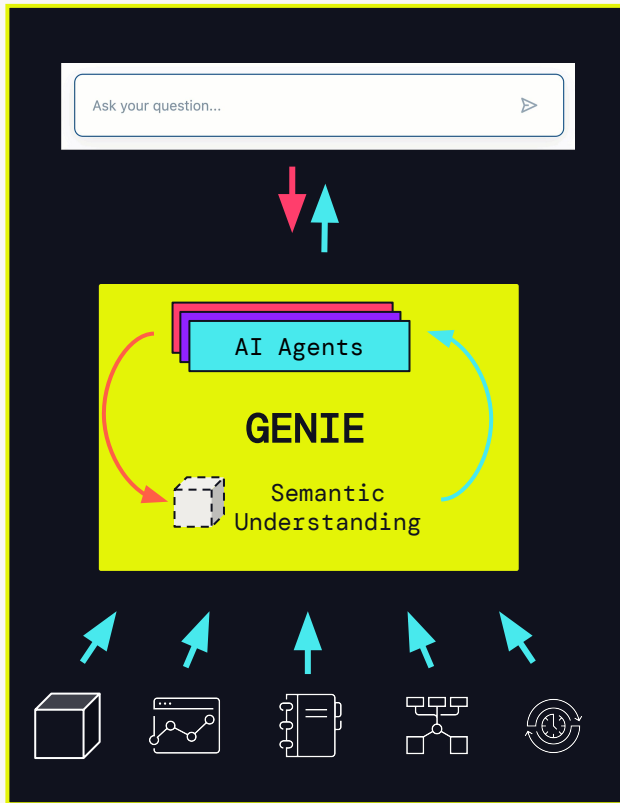
for everyone

Challenge with traditional BI

Challenge with traditional BI

Question

LLM

Semantic
Model

SQL

Pre-modeled
semantics

We designed Genie to

1. Continuously learn your data + semantics

2. Include controls for guidance + oversight

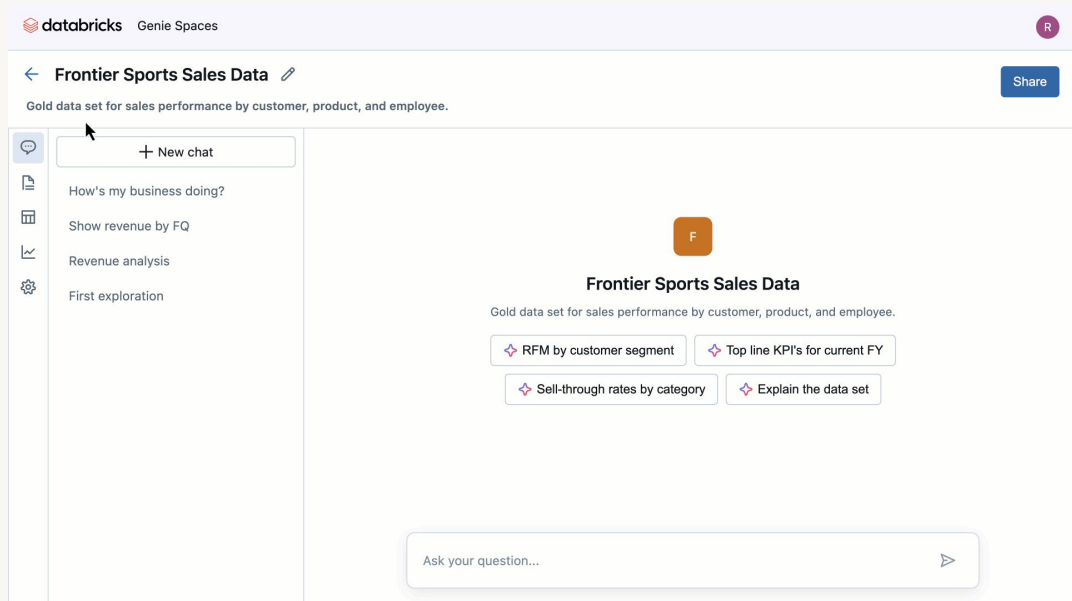3. Be easy and secure for business users

Genie Fundamentals

Genie fundamentals

Data teams set up **topic specific** Genie spaces

Business users can get answers to **net-new data questions**

Genie **learns over time** leveraging Data Intelligence Platform

How to configure Genie

Genie Set Up Process

Focused Topic + Data

- Each Genie space should be topic-specific

- Bring in well-documented, clean Unity Catalog tables+metadata

Add Instructions

- Authors can guide + teach Genie

- General Instructions and sample SQL statements

Accuracy Validation

- Authors + trusted business users can test expected questions

- Make needed improvements to Instructions

Focused Topic + Data

- Genie works on all types of data topics

- Bring in a **focused set of tables**

- Unity Catalog tables/views need to be well documented

- SUGGESTED: Create views to remove excess columns and clean data

General Instructions

- Gives data teams the power to give direct guidance

- Define your unique jargon, logic, concepts, KPIs, etc.

- Instructions are iterable over time

Assistant instructions

Add general instructions and example queries on how you want the space assistant to behave.

General Instructions

```
- win/won opportunities refer to the stagename value "5. Closed Won"
- lost opportunities refer to the stagename value "X. Closed Lost"
- An open opportunity is defined as not being "5. Closed Won" or "X. Closed Lost"
- Sales are calculated only on the opportunities where the stagename is a win/won opportunity. Sales people
performance is only evaluated on their won opportunities.
- When users ask for sales reps, they want the name of the sales rep not just the ID
- Expected value of an opportunity is calculated by multiplying the probability by the amount for an
opportunity.
- When an user asks about past purchases, check the opportunityhistory for that customer and the number of
won opportunity updates there are


Join relationships:
- opportunity.id is the primary key, opportunityhistory.opportunityid is the foreign key
- accounts.id is the primary key, opportunity.accountid is the foreign key. A customer's region info is in
the accounts table.
```

Discard   Save

Example SQL Queries

Add example queries that the assistant can learn from.

`+ Add example query`

what were the biggest closed deals in 2023 and who were the sales reps for them?

`SELECT o.name AS deal_name, u.name AS sales_rep_name, o.amount, o.cl...`

which sales reps converted open opportunities to closed opportunities at the highest percentage?

`SELECT u.name AS sales_rep_name, COUNT(o.id) AS total_opportunities,...`

Sample SQL Statements

- Sample SQL statements directly teach the model how to answer specific questions

- "Save as Instruction" on verified SQL statements teaches Genie for future questions
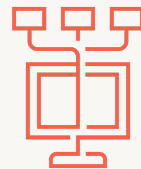
End user experience

Genie <> End users

Answer net-new questions

Get tabular or visual results

Provide feedback to teach Genie

Monitoring Page

- Proactively understand what your business users are asking

- Step through how Genie behaved in a conversation thread

- Make improvements to your Instructions for future questions
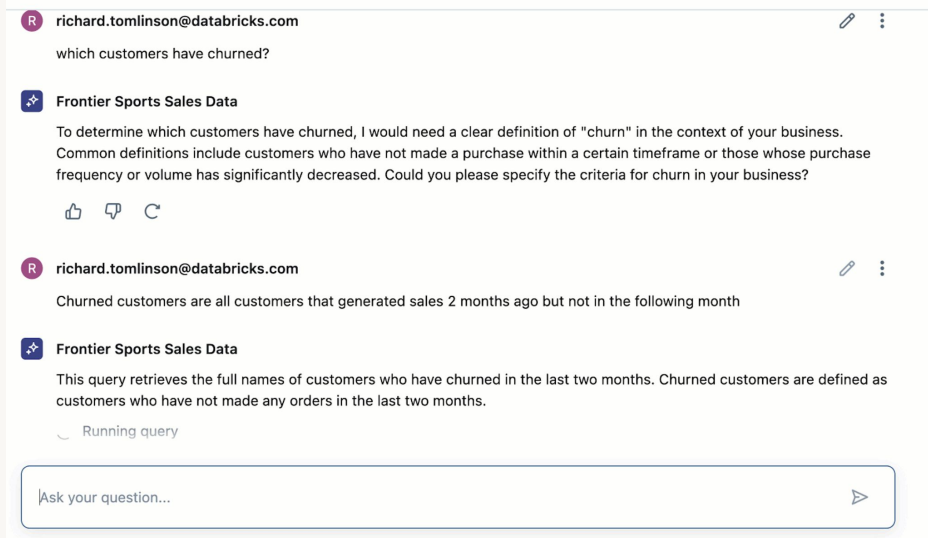
How Genie learns over time

Genie Asks Follow Ups

- When a question isn't clear, Genie is designed to ask follow ups/clarifications

- Users can add and save new semantic knowledge for Genie to handle future questions

Data Intelligence Platform

- Unity Catalog table metadata is automatically added to Genie's knowledge base

- Create Genie from Dashboard

- **COMING**: automatically learning from your workspace's Query History, Dashboards, Queries, Notebooks, etc.

Data

The tables power the space. Select the tables that you want to give as context to the space in the edit form.

⌄ ▦ accounts

This table contains information about accounts. It includes data on the industry, name, type, r...

Open in Catalog Explorer ↗

ᴬᴮc industry
The industry of the account

ᴬᴮc id
The unique identifier of the account

ᴬᴮc name
The name of the account

ᴬᴮc TYPE
The type of account

ᴬᴮc region_hq__c
The headquarters region of the account

ᴬᴮc region__c
The region of the account

ᴬᴮc company_size_segment__c
The size segment of the company (either SMB, MM, or ENT)

1.2 annualrevenue
The annual revenue of the account

Demo