Oracle Analytics Cloud – AI Assistant

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Public

Oracle Analytics Cloud – All about AI Assistant

The Oracle Analytics AI Assistant is an AI-powered tool embedded into Oracle Analytics Cloud that provides a conversational interface to help analysts become more productive. It has been built using Generative AI large language Model which translates the natural language and deliver instant answers to analytical queries. OAC users can build and refine visualizations using AI Assistant.

Two Options of AI assistant

- **OCI Gen AI default model**: - This version comes with OCI provided LLM.
- **Bring your Own LLM**: - In this version of AI Assistant, you canIntegrate third-party large language models (LLMs), such as OpenAI's ChatGPT-4 Turbo, by using your LLM API keys.

Both versions are available with all OAC shapes, there is no, minimum CPUs restrictions.

Anatomy of AI Assistant

Natural Language - User can ask a question in any of the supported language which are English, German, French, Italian, Portuguese, Spanish, and Thai. These are the languages which are officially supported by the underlying LLM.

Author & Consumer - AI Assistant is available to workbook authors for workbook author and consumer.

Datasets & Subject Areas - All types of datasets such as single table or multi tables along with subject areas are supported.

Incremental -Conversation can be iterative, so user can ask nested questions.

Smart Modifiers - User can leverage Smart modifiers to convert visualisations, for e.g changing bart chart to line chart.

Watchlist - For Anything you find interesting during the conversation there is an option to add in the watchlist

Supported Language :- Officially supported languages are English, German, French, Italian, Portuguese, Spanish, and Thai

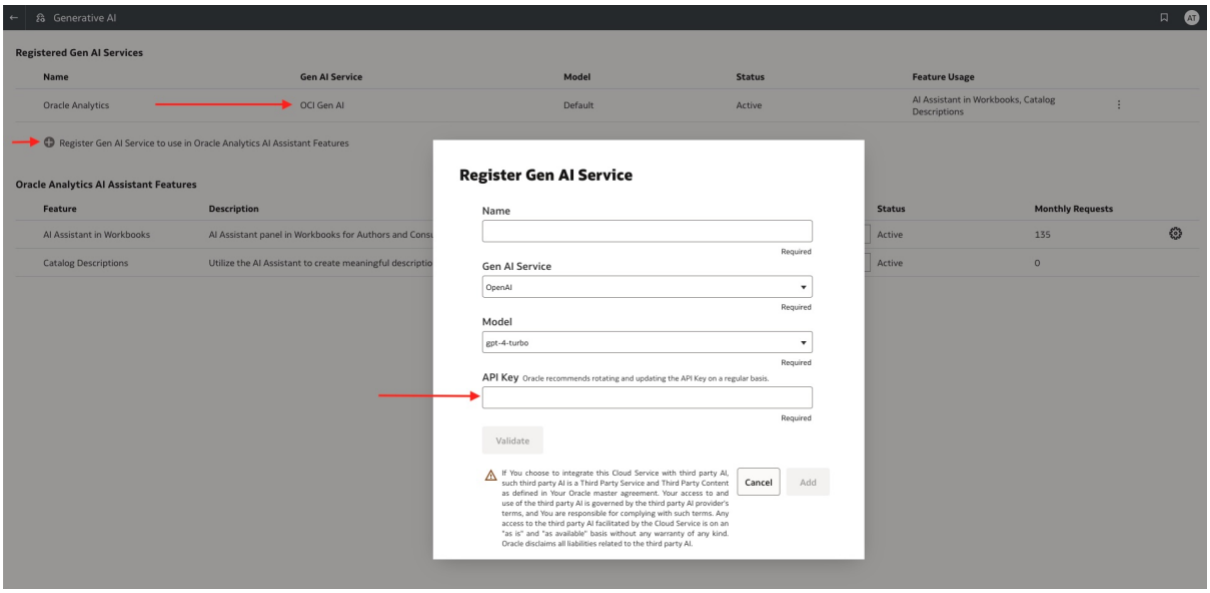
How to use AI Assistant

- Registered the LLM
- Enable the Datasets and Subject areas for AI Assistant
- Open the workbook and ask questions

Registered the LLM

Go to OAC home page then Console → Generative AI.

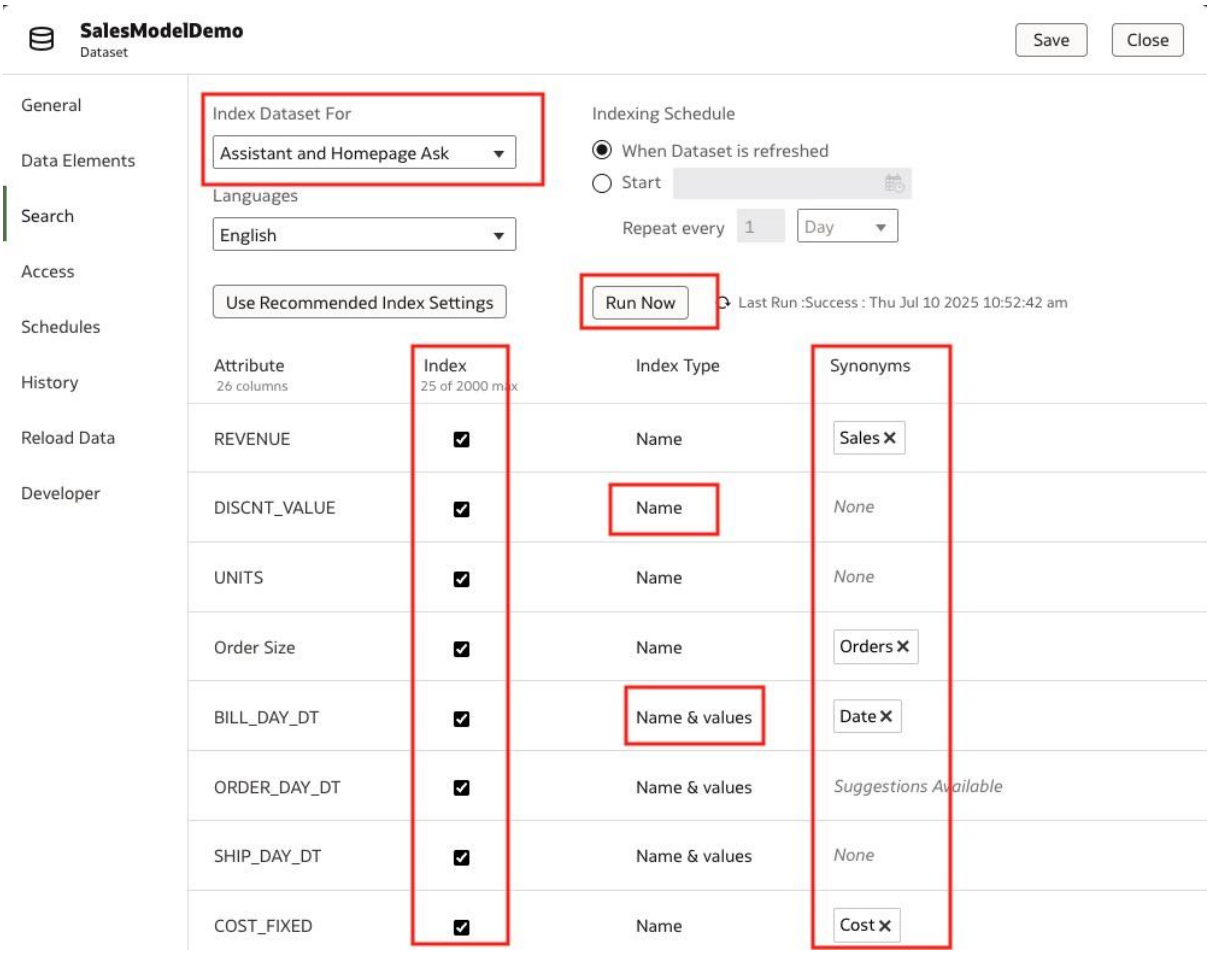
Here you have option to register your own LLM as shown in below screenshot.



Enable the Datasets

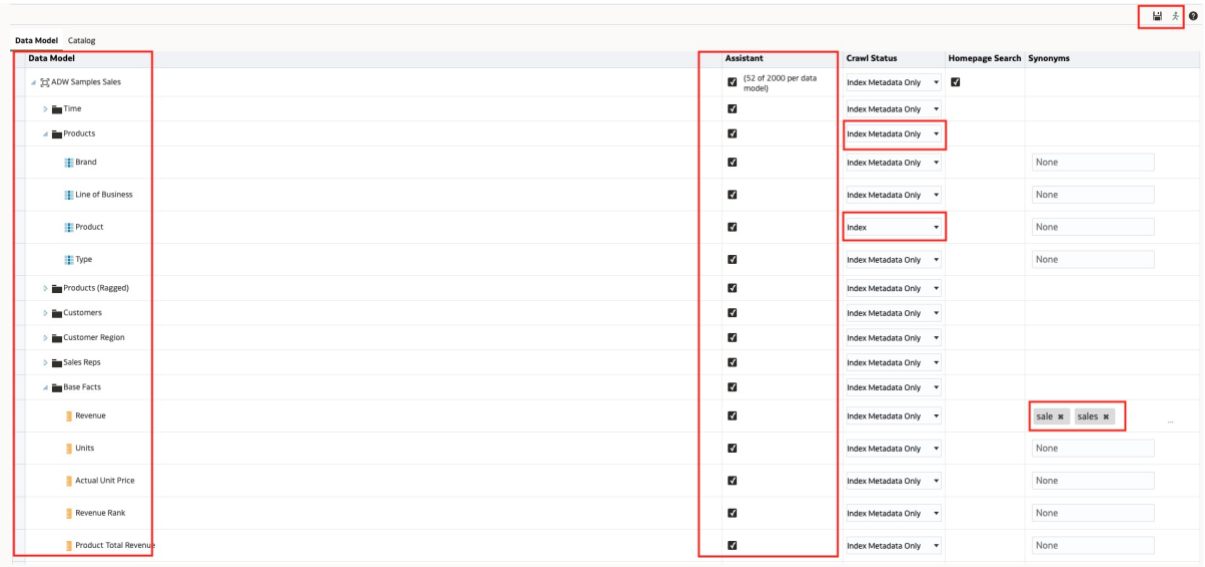
Once you have configured the AI Assistant then second step is to enable the dataset or subject area to use for query in AI Assistant.

- For dataset, go to dataset tab and inspect the dataset by right click menu.
- Now click on Search from right hand menu and select “Assistant” or “Assistant and home page ask” in “Index dataset for” dropdown.
- Select Index checkbox for all attributes you want to enable for AI Assistant.
- Under Index Type select the Name or Name and value. Here select name and value if user will be going to ask question on attribute value as well for e.g. what is total revenue for country United kingdom, here United Kingdom is value of attribute.
- Under synonyms provide all synonyms for an attribute for e.g. some users may ask question as what is total profit so here use profit as synonym for revenue.
- Now click save and click “run now’ button to train LLM on all selected attributes.



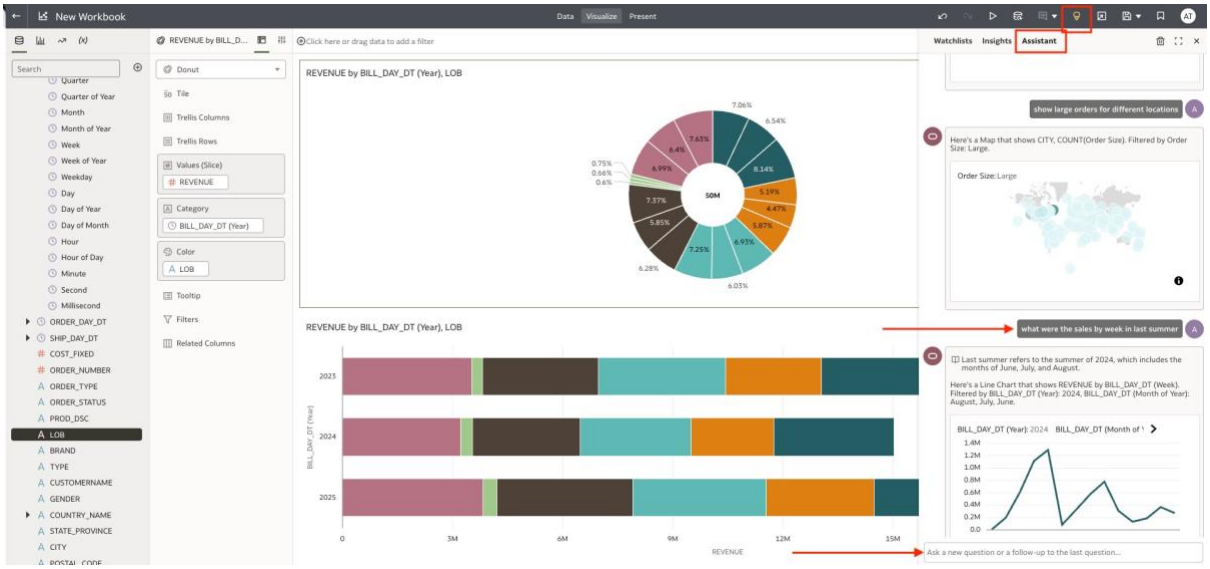
Enable the Subject Areas

- For subject area go to Console → Search Index.
- Select Assistant checkbox for all attributes you want to enable for AI Assistant.
- Under Crawl Stattus select the Index metadata only or Index. Here select the Index if user will be going to ask question on attribute value as well for e.g. what is total revenue for country United kingdom, here United Kingdom is value of attribute.
- Under synonyms provide all synonyms for an attribute for e.g. some users may ask question as what is total revenue while others can ask what is total profit so here use profit as synonym for revenue.
- Now click save and click “run now’ button to train LLM on all selected attributes



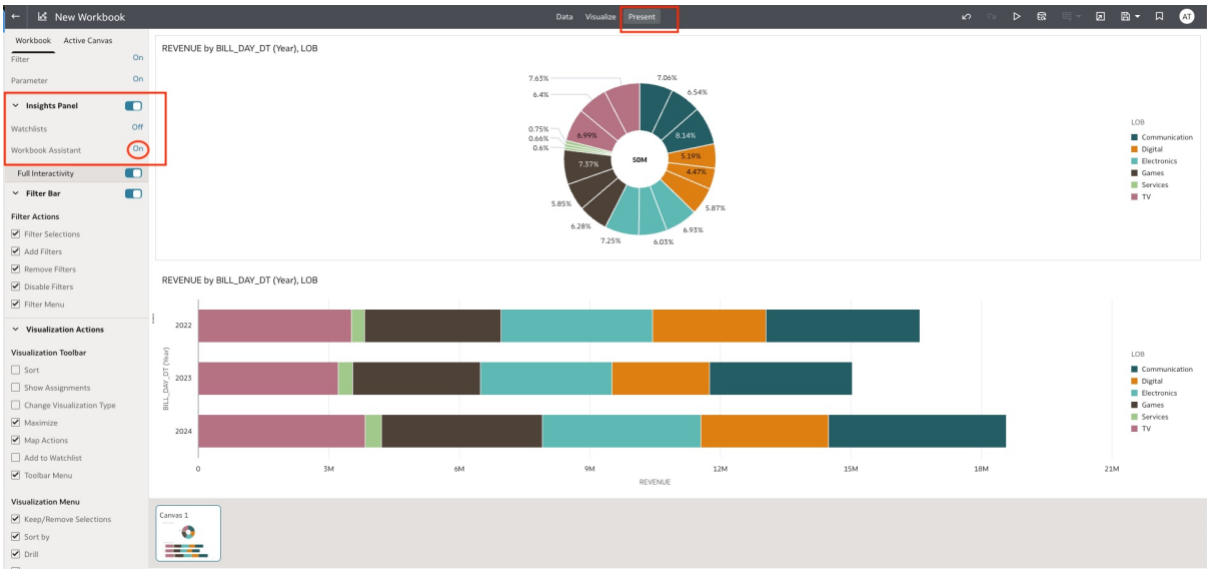
Use AI Assistant

- To use the AI Assistant, Create a workbook on Dataset or Subject Area.
- Click on Auto Insight (bulb button) and here you will find a Assistant tab.
- Now click on Assistant tab and start asking questions.
- You can use Chart Type button to change the Visualisation type.
- Similarly use add button to add any attribute in visualisation.
- Click on plus button to add visualisation in your canvas.



Enable AI Assistant for Consumer

In the workbook, click on “Present” tab and in the left hand menu under Insight Panel enable the workbook assistant.



Some basic guidelines for tuning the metadata

- Using the indexes you can control what user can ask about, so don't index the sensitive attributes.
- LLM will better responds with descriptive names so always provide the descriptive names of measures and attributes for e.g. Employee name not Ename.
- Identify the attributes that will often be filtered on and enable them for indexes.
- Use Synonyms, because some people called Revenue and some called as profit. So, use all possible synonyms. so that LLM can understand your question and respond.
- Disambiguate similar data columns for e.g. If you have multiple dates (invoice date, order date, bill date, then use which ever is base date or default date), otherwise if some will ask "sales in last quarter "then It might pick any randam date.
- Beware of using any special character and reserved words in attributes such as @, count, Total etc.
- Convert nemeric data into defined categories for e.g. small, medium, large orders or Silver, gold , platinum customers. Define what large order means for e.g. any order having more than 1000 order lines. You can use Binning for this.
- use grouping feaure of data preparation for instance grouping countries into continents.
- Get rid of null values, LLM don't understand Nulls, so describe your null values for e.g. not available, unknown etc.