Strategy₿

AI Frequently Asked Questions (FAQ)

Unlocking the power of AI: Answers to your most pressing questions

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Introduction

1. What is Strategy AI?

Strategy AI is a suite of advanced capabilities designed to meet the needs of various users, ranging from data analysts to business users to everyone who needs access to insights. It significantly improves the operational efficiency and enables organizations to innovate and leverage their own data for any business use case. The introduction of Auto, the AI-enabled assistant, revolutionizes data analysis by allowing business users to interact with data using natural language through an intuitive chatbot interface. This versatile tool enables users to ask questions related to dashboards or even utilize it in a standalone version that can be embedded seamlessly into various applications. Auto facilitates the creation and optimization of dashboards and the crafting of freeform SQL queries, streamlining complex data manipulation tasks.

2. What is Auto Expert?

Auto Expert specializes in providing detailed answers about Strategy products. It draws on a comprehensive repository of information, including product documentation, knowledge base articles, and additional resources, all accessible through https://www.strategysoftware.com. This feature is designed to enrich the customer's understanding and optimize their use of Strategy solutions.

3. Does Auto understand other languages besides English?

Auto is designed to work with any language that the Strategy platform can handle. This means that Auto can interpret and process requests in various languages. However, for Auto to accurately identify and retrieve specific information in your data queries, the data itself must be labeled or stored in the language you're using. It's important to note that the range of languages Auto can understand is determined by the language processing features provided by Azure OpenAI. So, Auto's multilingual capabilities are directly linked to the languages that Azure OpenAI supports.

Technical & Integration Aspects

4. What prerequisites are needed to deploy the Strategy AI?

Strategy AI is included for customers who purchased simplified cloud pricing for Strategy One. It is important to note that this is available for customers operating their environment on the Strategy Cloud Environment (MCE).

5. How do I enable Strategy AI in my existing Strategy environment?

You will need to enable the "Use Auto assistant and ML visualizations" privilege. Through the dashboard properties, you can also control which dashboards will have Auto enabled.

6. Which 3rd party software, i.e., data sources, operating systems, and browsers are supported?

Strategy AI is fully compatible with the Strategy Cloud Environment (MCE), which supports a wide range of third-party platforms, including cloud providers, operating systems, data sources, and client browsers. As MCE is a fully hosted and managed environment, customers can benefit from a hassle-free experience without the need to concern themselves with the underlying details, such as the operating system version, which is managed seamlessly on their behalf.

7. How does the connectivity with Azure OpenAI work behind the scenes?

Strategy Auto integrates seamlessly with the advanced large language models provided by the Microsoft Azure OpenAI Service. This integration, along with the related setup, is entirely managed internally, ensuring a smooth user experience. Consequently, customers are not required to provide any additional configurations or keys to access this functionality, allowing them to leverage these powerful tools effortlessly.

8. Which versions of the Azure OpenAI service are utilized

Strategy AI integrates with Microsoft Azure OpenAI and utilizes both GPT 3.5 and GPT 4 models, depending on the specific requirements of the use cases. This flexibility ensures that the most appropriate and advanced AI capabilities are applied to enhance analytical functions and insights.

9. Can I upload my own model or decide which vendor to use?

No, Strategy AI is exclusively integrated with the Microsoft Azure OpenAI Service, and the setup is fully managed internally by Strategy. Currently, the use of custom models or integration with alternate vendors is not supported. This ensures a streamlined and consistent AI experience within the Strategy ecosystem.

10. Does Strategy AI provide predictive or prescriptive analytics for future outcomes or recommendations?

It provides predictive analytics by producing forecasts using advanced ML-based algorithms. By analyzing historical and current data patterns, it can offer insights into potential future outcomes, allowing users to make more informed decisions. While it excels in predicting trends and patterns, it doesn't explicitly prescribe specific actions or recommendations.

Licensing & Pricing

11. How can I purchase Strategy AI?

Strategy AI is included for customers who purchased simplified cloud pricing for Strategy One.

12. Can I use my own Microsoft Azure OpenAI license?

No, Strategy internally manages the integration with Microsoft Azure OpenAI, and currently does not support the use of individual licenses for the service. This approach ensures a seamless and standardized implementation across all deployments.

Performance & Accuracy

13. How does Strategy AI enhance Strategy's existing capabilities?

Strategy AI amplifies Strategy's existing capabilities by introducing advanced artificial intelligence and machine learning features. It aids in AI-assisted data exploration, automates dashboard design processes, and offers tools like SQL generation and ML-based visualization methods. It streamlines data analysis and representation, making the user experience more intuitive and providing deeper insights from the data, all within the familiar Strategy platform.

14. How accurate is Strategy's AI information?

The information's reliability is rooted in the precision of the Strategy semantic layer and its robust security model. It strictly utilizes data sourced from Strategy, and all calculations and operations are executed by the trusted Strategy analytical engine. This ensures accurate and secure data processing and representation.

Data Privacy & Security

15. How do you ensure compliance with international data protection regulations?

Strategy AI utilizes the Microsoft Azure OpenAI service, which has received certifications for compliance with CCPA, GDPR, SOC 2, and ISO 27001.

16. Is the data transmitted to and from Strategy AI encrypted?

All communications between the Strategy Platform and Microsoft Azure OpenAI Service are conducted strictly over secured channels with TLS 1.2 or higher. This ensures that data is always encrypted during transit, preventing unauthorized access or breaches.

17. Does Strategy AI recognize or identify users based on their questions or interactions?

No, it does not identify users based on their questions or interactions. While the Strategy platform associates' interactions with user IDs for internal tracking, no personal user information or identifiers are transmitted to the Microsoft Azure OpenAI service. Your privacy is preserved throughout your interactions with Auto.

18. What data or conversation is retained by the Microsoft Azure OpenAI service?

No data or conversation is retained by the Microsoft Azure OpenAI service. The service is configured not to retain or use any transmitted data for training or any other purposes. Your data's privacy and security are paramount in this integration.

19. Is my interaction data used to train the Microsoft Azure OpenAI service?

No, your interaction data is not used to train the Microsoft Azure OpenAI service. We have configured the service to ensure that no data submitted for processing is retained or utilized for model training purposes. Upholding the privacy of your data is our top priority.

20. How does Strategy AI safeguard my conversation?

Ensuring the safety of your data is paramount when using Auto. The interactions take place within the secure boundaries of the Strategy platform, ensuring no sensitive or personal data is ever stored externally. Strategy AI uses Microsoft Azure OpenAI, and all communication is strictly over secure channels with TLS 1.2 or higher. This ensures that data is always encrypted during transit, preventing unauthorized access or breaches. Furthermore, the configuration is strictly set to prevent data retention or usage, consistently upholding the confidentiality and integrity of your data.

21. How do you ensure that my conversations aren't misused?

We prioritize the security and integrity of your data. All communications between the Strategy platform and external services, such as Microsoft Azure OpenAI, are encrypted to ensure secure data transmission. Additionally, configurations are in place to ensure that requests to these external services do not retain data or use it for model training. This multi-layered approach to security guarantees that your data remains protected and is never misused.

Support & Maintenance

22. What level of support and maintenance can users expect?

Strategy AI is an integral component of the Strategy AI product, so it receives the same level of support and maintenance as all services within the Strategy Cloud Environment (MCE). Software updates are carried out quarterly to ensure optimal performance and reliability. Moreover, specific components of the Strategy AI product may receive updates more frequently to introduce new functionalities and improvements.

23. How do I troubleshoot technical issues?

Strategy AI is a component of the Strategy Cloud Environment (MCE), and Strategy fully manages all its services and components. If you encounter any technical issues, please contact Strategy Tech Support for assistance.

24. How can I keep updated with the latest features and enhancements?

Customers on the MCE platform will receive automatic updates to their environment quarterly. Components specific to Strategy AI may see updates more frequently. We ensure that all changes, new features, and enhancements are communicated promptly to our customers, so they are always informed about the latest developments.

25. How do you safeguard against misuse or attempts to deceive Strategy AI?

We have mechanisms in place to detect and handle unusual or inappropriate behavior with Auto. While the system is designed to respond to a wide range of queries, any attempts to manipulate or "trick" the engine will be identified, and the system will respond appropriately. It's important to note that Strategy AI relies on the accuracy of the Strategy semantic layer and its security model, ensuring trusted and reliable responses.

26. Is specialized training required to use Strategy AI?

Strategy AI has been designed with an emphasis on user-friendliness and intuitiveness. This includes smart recommendations to guide the users on the types of questions that can be asked. Consequently, specialized training or onboarding is unnecessary to utilize its features effectively.

Compliance

27. Is Strategy AI compliant with GDPR regulations?

Strategy AI utilizes the Microsoft Azure OpenAI Service, which has received certifications for compliance with CCPA, GDPR, SOC 2, and ISO 27001.

28. Is the service compliant with FedRAMP?

Strategy AI is available in the Strategy Cloud for Government. Auto utilizes the Microsoft Azure OpenAI service, which is certified to comply with several standards, including FedRAMP.

29. What privileges are required for me to access the AI features?

After the Strategy AI is activated in your environment, users must be granted the "Use Auto and ML visualizations" privilege to utilize the AI capabilities.

Auto Answers

Technical and Integration Aspects

30. In what parts of Strategy is Auto Answers integrated?

Auto is seamlessly integrated into the Library's dashboard consumption experience, enabling users to query data directly with ease. This feature allows for immediate access to insights and analysis right from the dashboard interface. Through the dashboard properties, you can control which dashboards will have Auto Answers enabled.

31. How do I interact with Auto Answers?

In Library, simply open a dashboard and select the "Auto" icon in the toolbar to activate the chatbot panel. Here, you can choose from a list of recommended questions or enter your own queries to gain insights.

32. Does Auto learn from its interactions?

Auto leverages the Microsoft Azure OpenAI service. However, to safeguard data privacy and confidentiality, all interactions with the OpenAI service ensure that no data is retained or employed for model training. You can utilize the Knowledge feature to furnish Auto with contextual memory about your data, thereby enhancing the accuracy and relevance of its responses. This functionality can be accessed through the "Dashboard properties" option within the Dashboard, allowing Auto to deliver precise and contextually aware insights efficiently.

33. What kinds of questions and tasks is it capable of?

It excels at data exploration, addressing questions concerning dashboard data, such as aggregations or summaries across its different dimensions. These queries can extend beyond the data currently visualized on the dashboard, allowing for a deeper and more comprehensive analysis of available information.

Performance and Accuracy

34. Are there any guidelines on framing questions to obtain more accurate responses?

To improve the accuracy of responses from Auto, it is beneficial to formulate your inquiries using the specific attributes and metrics suggested by the autocomplete feature. This approach ensures that your questions are aligned with the system's recognized terminology, enhancing the precision of the answers you receive. Additionally, leveraging knowledge assets can provide Auto and the bot with a deeper understanding of the context.

35. How does Auto handle abstract questions?

For abstract questions, Auto relies on the data and semantic information provided in the dashboard. It will not incorporate information beyond what's indicated. While it strives to give relevant answers within these constraints, the specificity and accuracy might be influenced by the nature of the abstract question. It's recommended to frame questions with clarity to obtain the most precise response within the provided data context.

36. What AI technologies power Auto, and how does it continuously learn and improve?

It harnesses the latest advanced language models (LLM) provided by Microsoft Azure OpenAI, combined with Strategy's Python-based advanced ML-based algorithms. This dual approach enables Auto to process data proficiently, pinpointing trends, key drivers, and generating forecasts. For data privacy and security, requests to OpenAI are meticulously configured to neither retain nor use the data for model training. This ensures optimal performance while upholding strict data confidentiality standards.

37. Does Auto provide predictive or prescriptive analytics for future outcomes or recommendations?

Yes, Auto is equipped to provide predictive analytics by producing forecasts using advanced MLbased algorithms. By analyzing historical and current data patterns, Auto can offer insights into potential future outcomes, allowing users to make more informed decisions. While Auto excels in predicting trends and patterns, it doesn't explicitly prescribe specific actions or recommendations.

Data Privacy and Security

38. Does Auto retain our conversation history, and how is the privacy of our interactions ensured?

Auto does not persist your conversation history outside of the active user session, ensuring that the content of your conversation is not stored. When interfacing with external services like Microsoft Azure OpenAI, we have strict configurations in place to ensure that no data is retained or utilized for their model training. Strategy Platform Analytics gathers telemetry data on user interactions with Auto to empower administrators. This includes capturing the user's question, the interpretation of the question (if requested), the SQL query generated to address the question, and the Strategy Template created to retrieve and present the result. Access to this data is managed by limiting the number of users accessing the Auto Adoption and Auto Question Analysis dashboards and their dependent schema objects in Platform Analytics. Platform Analytics is hosted under each customer's tenant.

39. How do the AI features adhere to the access control lists and data security measures applied to a dashboard?

The AI features within Strategy operate strictly within the platform's security boundaries, adhering to access control lists (ACLs) and data security measures such as Security Filters established for a dashboard and its underlying objects. Interactions with Auto are meticulously controlled to only retrieve and display data that the user is explicitly permitted to access. This guarantees that user-specific data security and permissions are rigorously enforced across the platform. Furthermore, the AI features function within the constraints set by Privileges, ACLs, and specified data security measures for each user on the Strategy platform, ensuring a secure and compliant data environment.

Feedback

40. What steps should I take if Auto delivers inaccurate or unsuitable answers?

If Auto gives inaccurate or unsuitable responses, we recommend reaching out to Strategy Technical Support to report the issue.

41. To what extent can Auto's responses be customized?

Authors have the power to finely tune Auto, tailoring their responses to fit specific contexts and tones. This capability is unlocked through customizations, empowering authors to incorporate personalized instructions or knowledge files that enrich the chatbot's capabilities and align them with user preferences. Fine-tuning the tone of responses is made seamless through the dedicated customizations tab, easily accessible in Edit mode.

Auto Dashboard

42. How do I interact with Auto Dashboard?

For automated dashboard creation, initiate a new dashboard, add a dataset, or import data, then click the "Auto" icon in the toolbar. Select one of the suggested analyses or enter your question.

Auto SQL

43. How do I interact with Auto SQL?

For advanced users or architects with schema editing rights, open the schema editor in Workstation and incorporate a Free-form SQL table.

Custom Auto Bots

44. In what parts of Strategy can the Custom Auto Bots be integrated?

Users can access Auto bots directly on the Library interface. They can also create new bots from the (+) Menu.

45. Does Auto learn from its interactions?

Auto utilizes the Microsoft Azure OpenAI service, but with stringent safeguards to ensure data privacy and confidentiality. All interactions with the OpenAI service are configured so that no data is retained or used for model training. Additionally, Auto can be further customized via the Customization panel in authoring mode. Here, you can use custom instructions to define the bot's context and set the tone for its responses. To further enhance the accuracy and relevance of its responses, you can add knowledge files. These files provide Auto with contextual memory about your data, significantly boosting its ability to deliver precise and contextually relevant insights.

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