

# MicroStrategy AI

## Product FAQ

### Auto AI

How have customer satisfaction scores for Product B changed in the last 6 months?

Customer satisfaction are up 10.5% from this day 6 months ago, and satisfaction peaked in the month of June.

Can you tell me how many daily users we have on the app?

Sure, the app sees about 630 unique users each day. The average age range for the users is about 25-30.

Can you help to ensure the email promotion for today goes out to all primary customers?

Yes, currently the promotional email set for today will go to all primary customers and prospects.

What can we help you with?



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# Introduction

## 1. What is MicroStrategy AI?

MicroStrategy AI enhances the platform with AI-driven features, elevating the analytical potential and efficiency for business users, analysts, and advanced users alike. Auto, the new AI-enabled assistant enables business users to analyze data through natural language in an intuitive chatbot interface. It can also automate Dossier creation based on user business requirements. Furthermore, advanced users can use Auto to craft and optimize free-form SQL queries, enriching the application's schema.

## 2. In what parts of MicroStrategy is Auto integrated?

Auto is accessible within the Library's Dossier consumption experience, allowing users to directly query data. In the Dossier editor, users can effortlessly create Dossiers either with one click or by posing a business question. Additionally, within the Workstation's Schema editor, users can prompt Auto to produce free-form SQL statements to source data for a logical schema table.

## 3. What is the difference between Auto and AI Support?

Auto is an AI assistant that knows about customer's data. It pairs up with the semantic layer to provide answers for customers. The AI Support bot will help customers to answer questions about the MicroStrategy product. It contains data from the product documentation, knowledge base articles, and more.

# Interacting with Auto

## 4. How do I interact with Auto?

In Library, open a Dossier and click on the "Auto" icon in the toolbar to access the chatbot panel. You can choose from the recommended questions or input your own. For automated Dossier creation, initiate a new Dossier, add a dataset, or import data, then click the "Auto" icon in the toolbar. Select one of the suggested analyses or enter your question. For advanced users or architects with schema editing rights, open the schema editor and incorporate a Free-form SQL table. Here, Auto can be prompted by typing a business question.

## 5. Does Auto understand other languages besides English?

Yes, Auto comprehends all languages supported by the MicroStrategy platform. However, for queries pinpointing specific data points, the data elements must be present in the chosen language.

## 6. Does Auto learn from its interactions?

Auto utilizes 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.

## 7. What kinds of questions and tasks is Auto capable of?

Auto excels at data exploration, addressing questions concerning dossier data, such as aggregations or summaries across its different dimensions. These inquiries don't have to be limited to the data visualized within the dossier. When building dossiers, Auto responds to questions about the chosen dataset(s), crafting a dossier with visualizations that address the business question from multiple angles or dimensions.

## 8. Is there a cap on the number of questions addressed by the AI features?

Users can pose questions up to the limit specified in their contracted bundle across the organization. If more queries are needed, increments of 20,000 questions can be acquired. These additional questions are accessible to all users granted the rights to use Auto functionalities.

## 9. How will Auto manage abstract questions?

For abstract questions, Auto relies on the data and semantic information provided in the dossier. 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.

## 10. Are there any guidelines on framing questions to obtain more accurate responses from Auto?

Yes, to obtain more accurate responses from Auto, it's advisable to frame your questions using the names of attributes and metrics that are recommended by the autocomplete feature as you type. This ensures alignment with the system's recognized terminology, leading to more precise answers.

# Technical & Integration Aspects

## 11. What prerequisites are needed to deploy the MicroStrategy Auto?

To deploy Auto, customers must first purchase the MicroStrategy AI add-on for their deployment. It's important to note that this add-on is exclusively available for customers operating their environment on the MicroStrategy Cloud Environment (MCE).

## 12. How do I enable Auto in my existing MicroStrategy environment?

To enable users with Auto they will need to enable the **“Use Auto assistant and ML visualizations”** privilege. They can also specify which dossiers will have Auto enabled from the Dossier Properties.

## 13. Which 3rd party software i.e., data sources, operating systems, and browsers are supported for Auto?

Auto aligns with the compatibility of the MicroStrategy Cloud Environment (MCE) when it comes to 3rd party products. This encompasses cloud providers, operating systems, data sources, and client browsers. Since MCE is a fully hosted and managed environment, customers can be assured that underlying specifics, like the operating system version, are seamlessly handled.

## 14. Is Auto capable of integrating with external third-party applications or platforms?

In its current iteration, Auto is exclusive to the MicroStrategy platform, specifically within the Dossier consumption experience in Library, the Dossier editor, and the Schema Editor in Workstation. However, future releases will provide the capability to embed Auto into third-party applications, like web portal.

## 15. How does the connectivity with OpenAI work behind the scenes?

Behind the scenes, MicroStrategy integrates with the advanced language models offered by the Microsoft Azure OpenAI service. This integration and its setup are managed entirely internally. As a result, customers are not required to supply any extra configurations or keys for its functionality.

## 16. Which versions of the OpenAI model are utilized by Auto?

Auto integrates with Microsoft Azure OpenAI and uses both GPT 3.5 and GPT 4, depending on specific use cases.

## **17. Can I upload my own model or decide which vendor to use?**

No, Auto is specifically integrated with the Microsoft Azure OpenAI service, and the setup is internally managed by MicroStrategy. Currently, uploading custom models or choosing a different vendor is not supported.

# Licensing and Pricing

## **18. How do I sign up to use MicroStrategy AI and the Auto chatbot?**

To use the MicroStrategy AI Assistant, you'll need to purchase the MicroStrategy AI add-on for your environment. Please contact your MicroStrategy Account Executive to request it.

## **19. Are there additional licensing or costs associated with enabling the AI features?**

Yes, enabling the AI features requires an additional cost as the MicroStrategy AI is an add-on product. The pricing structure is consumption-based, determined by the number of questions asked. You can purchase questions in bundles, with each bundle containing 20,000 questions.

## **20. What advantages does the consumption-based licensing model offer?**

Given that user engagement with AI can vary significantly across a broad user base, this model offers flexibility. Some users might frequently utilize the AI features, while others might do so sporadically. By adopting a consumption-based pricing strategy, we enable our customers to make the AI functionality available to all users without the challenge of determining a fixed per-user cost. Essentially, you pay for the actual usage, aligning costs with the value derived. As usage increases, it's a direct reflection of the value being delivered, ensuring you're only investing in what truly benefits your organization.

## **21. Can I use my own Microsoft Azure OpenAI license?**

No, the integration with Microsoft Azure OpenAI is managed internally by MicroStrategy, and currently, using your own license for the service is not supported.

**22. What is the duration for using the bundle of questions? What occurs if I don't exhaust all my requests within a year?**

A bundle of 20,000 questions has a validity of 1 year from the date of purchase. If you don't utilize all your requests within that year, any remaining balance of unused questions will expire after the one-year period.

**23. Is there a way to monitor my usage data? How can I determine if I'm nearing the limit of my question bundle?**

Yes, you can track the consumption of your questions through the dossier provided by Platform Analytics. This dossier will clearly indicate when you are approaching the limit of your question bundle.

## **Performance and Accuracy**

**24. How does Auto enhance MicroStrategy's existing capabilities?**

Auto amplifies MicroStrategy's existing capabilities by introducing advanced artificial intelligence and machine learning features. It aids in AI-assisted data exploration, automates dossier 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 MicroStrategy platform.

**25. How accurate is Auto's information?**

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

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

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

## **27. 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 ML-based algorithms. By analyzing historical and current data patterns, Auto can offer insights into potential future outcomes, allowing users to make more informed decisions. However, while it excels in predicting trends and patterns, it doesn't explicitly prescribe specific actions or recommendations.

## **28. To what extent can Auto's responses be customized?**

Currently, Auto's responses cannot be customized. However, in upcoming releases, we plan to introduce features allowing users to configure special instructions. This will enable Auto to tailor its output based on parameters such as tone, brevity, job role, and more, ensuring a more personalized interaction experience.

# **Data Privacy and Security**

## **29. How does Auto safeguard my data?**

Ensuring the safety of your data is paramount when using Auto. All interactions take place within the secure boundaries of the MicroStrategy platform, ensuring no sensitive or personal data is ever transmitted or stored externally. Furthermore, when interfacing with external services like Microsoft Azure OpenAI, the configuration are strictly set to prevent data retention or usage, upholding the confidentiality and integrity of your data consistently.

## **30. 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. While MicroStrategy may log usage data for the purpose of tracking the consumption of questions, the specific contents of the conversation are never logged, preserving the privacy of your interactions.



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

Auto utilizes the Microsoft Azure OpenAI service, which has received certifications for compliance with CCPA, GDPR, SOC 2, SOC 3, and FedRAMP.

**32. Can I request a copy of my data or have it deleted?**

Auto utilizes the Microsoft Azure OpenAI service which is stateless, so no data is stored.

**33. Is the data transmitted to and from Auto encrypted?**

The data transmitted to and from Auto is encrypted. The communication between the MicroStrategy platform and the Microsoft Azure OpenAI services is conducted over secure channels, ensuring encryption during transit.

**34. Does Auto recognize or identify users based on their questions or interactions?**

No, Auto does not identify users based on their questions or interactions. While the MicroStrategy platform does associate 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.

**35. What customer data is transmitted to or retained by the Microsoft Azure OpenAI service?**

No customer-specific data or identifiers are retained by the Microsoft Azure OpenAI service. While questions and prompts are sent to the service for processing, they are anonymized, ensuring no personally identifiable information is shared. Furthermore, the service is configured to not retain or use any transmitted data for training or any other purposes. Your data's privacy and security are paramount in this integration.

**36. 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. The service is configured to ensure that no data sent for processing is retained or utilized for model training. Your data's privacy is a top priority.

### **37. How do the AI features adhere to the access control lists and data security measures applied to a Dossier?**

The AI features strictly respect the access control lists (ACLs) and data security measures such as Security Filters set for a Dossier and its underlying objects. Any interaction with Auto will only retrieve and display data that the user has permissions to access. This ensures that user-specific data security and permissions are consistently enforced throughout the platform.

### **38. How do you ensure that my data isn't misused?**

We prioritize the security and integrity of your data. No data you provide is persisted outside of your session. Communication between the MicroStrategy platform and external services, like Microsoft Azure OpenAI, is encrypted to ensure secure transmission. Furthermore, requests made to these external services are configured so that no data is retained or used for model training. Internally, MicroStrategy may log usage data for tracking purposes, but the content of your conversation is not logged. This multi-layered approach ensures that your data remains protected and is not misused.

## **Support and Maintenance**

### **39. What level of support and maintenance can users expect for Auto?**

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

### **40. How do I troubleshoot technical issues?**

Auto is a component of the MicroStrategy Cloud Environment (MCE), and all its services and components are fully managed by MicroStrategy. If you encounter any technical issues, please reach out to MicroStrategy Tech Support for assistance.

### **41. How can I keep updated with the latest features and enhancements?**

Customers on the MCE platform will receive automatic updates to their environment on a quarterly basis. Components specific to MicroStrategy 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.

#### **42. How do you safeguard against misuse or attempts to deceive Auto?**

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 Auto relies on the accuracy of the MicroStrategy semantic layer and its security model, ensuring trusted and reliable responses.

#### **43. Is specialized training required to use Auto?**

Auto has been designed with an emphasis on user-friendliness and intuitiveness. It provides query suggestions to guide users on the types of questions that can be asked. Consequently, specialized training or onboarding is not necessary to utilize its features effectively.

## **Compliance**

#### **44. Is Auto compliant with GDPR regulations?**

Auto utilizes the Microsoft Azure OpenAI service, which has received certifications for compliance with CCPA, GDPR, SOC 2, and SOC 3.

#### **45. Is the service compliant with FedRAMP?**

Although Auto utilizes the Microsoft Azure OpenAI service, which is certified to comply with several standards, including FedRAMP, the MicroStrategy AI capabilities are still not available in the MicroStrategy Cloud for Government.

#### **46. What privileges are required for me to access the AI features?**

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

# Feedback

## **47. What steps should I take if Auto delivers inaccurate or unsuitable answers?**

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

## **48. Is there a feature in the interface that allows end users to give feedback to improve the AI model?**

In the current release, users cannot provide feedback directly within the interface. However, in upcoming releases, there will be an option for users to give immediate feedback on Auto's responses, helping MicroStrategy to further refine the product.

