

# Smart Query

Seamless Data Exploration and Tailored Tables for Informed Decision-Making.





# I. Introduction

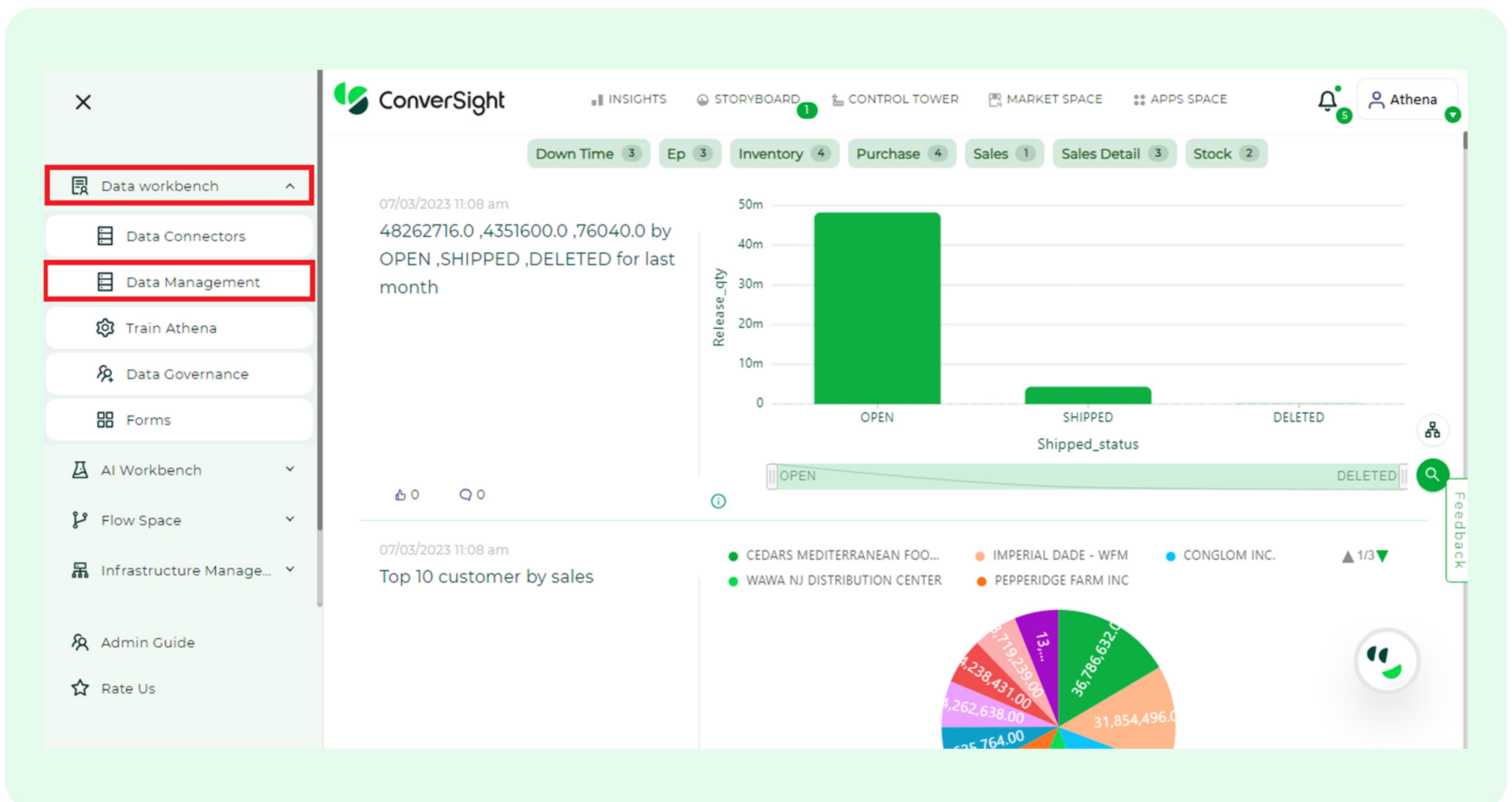
The Smart Query feature in the ConverSight platform revolutionizes the way data is retrieved and analyzed, providing users with a seamless and efficient experience. This user-friendly interface allows users to create customized tables directly from the ConverSight database or they have the privilege to create personalized tables from the client-side databases. With Smart Query, users gain the power to effortlessly access and extract valuable information from databases, which can then be transformed into tailor-made tables that precisely suit their specific needs and requirements. This transformative capability not only enhances data accessibility but also empowers users to efficiently organize and manipulate information, enabling them to make well-informed decisions. By simplifying the process of data retrieval and table creation, Smart Query streamlines workflows and saves valuable time, ultimately contributing to improved productivity and better outcomes for enterprises utilizing the ConverSight platform.

This datasheet provides a comprehensive look at the Smart Query feature, delving into both its internal workings and external presentation. By examining this functionality, users can understand how Smart Query optimizes and improves the effectiveness of data retrieval processes, all while maintaining a user-friendly experience.

## 2. Creating Smart Query

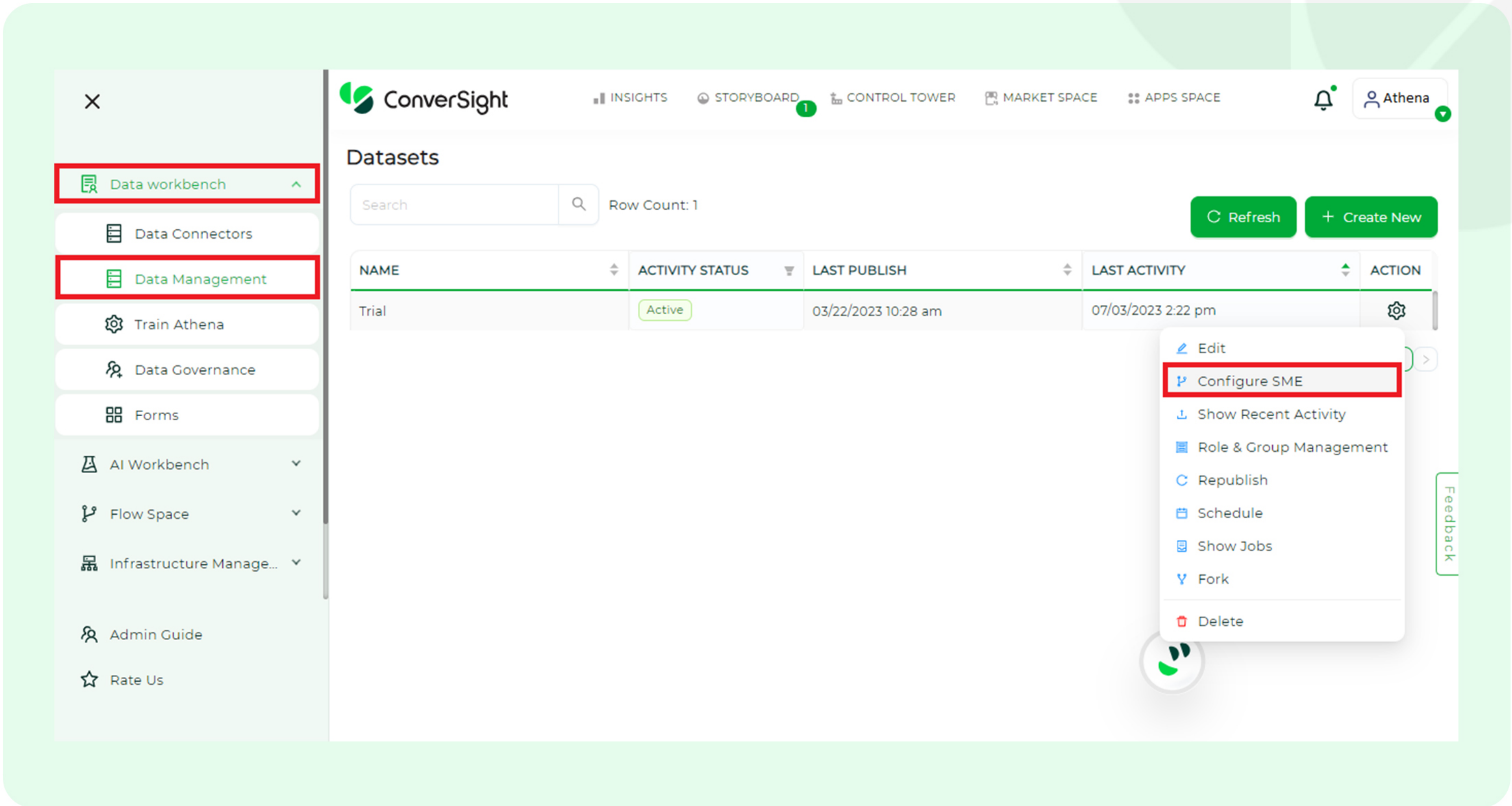
To create a Smart Query in the ConverSight platform, follow these steps:

- 🟢 Navigate through **'Data Workbench'** and click **'Data Management'**.

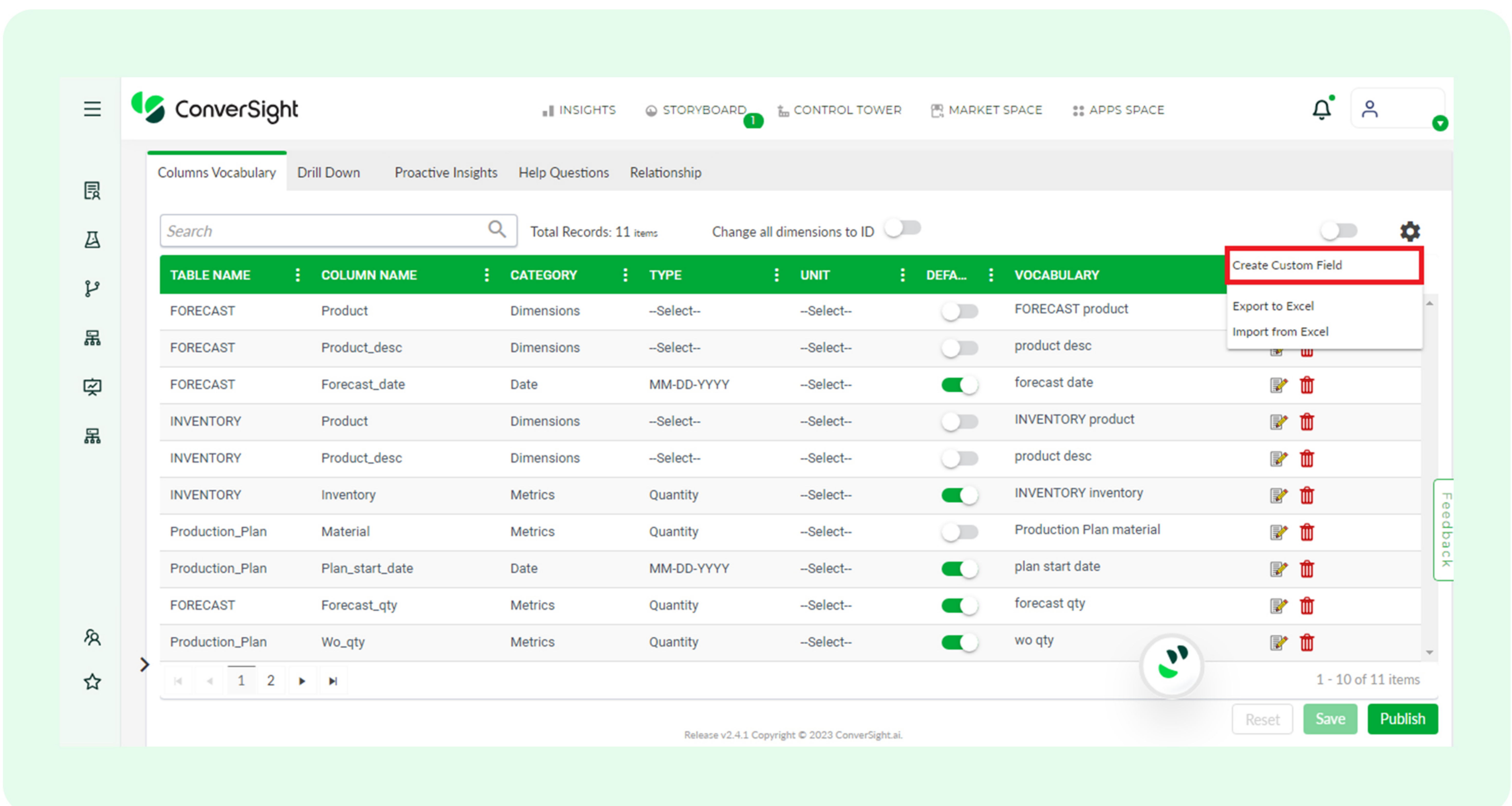




- Select the dataset to create the Smart Query. Click the **'Settings'** icon in the Action column and choose configure SME from the list. You will be redirected to the SME Coaching Page.



- Locate the Settings icon positioned on the right-hand side under the Columns Vocabulary tab and simply click on the **'Create Custom Field'** option.

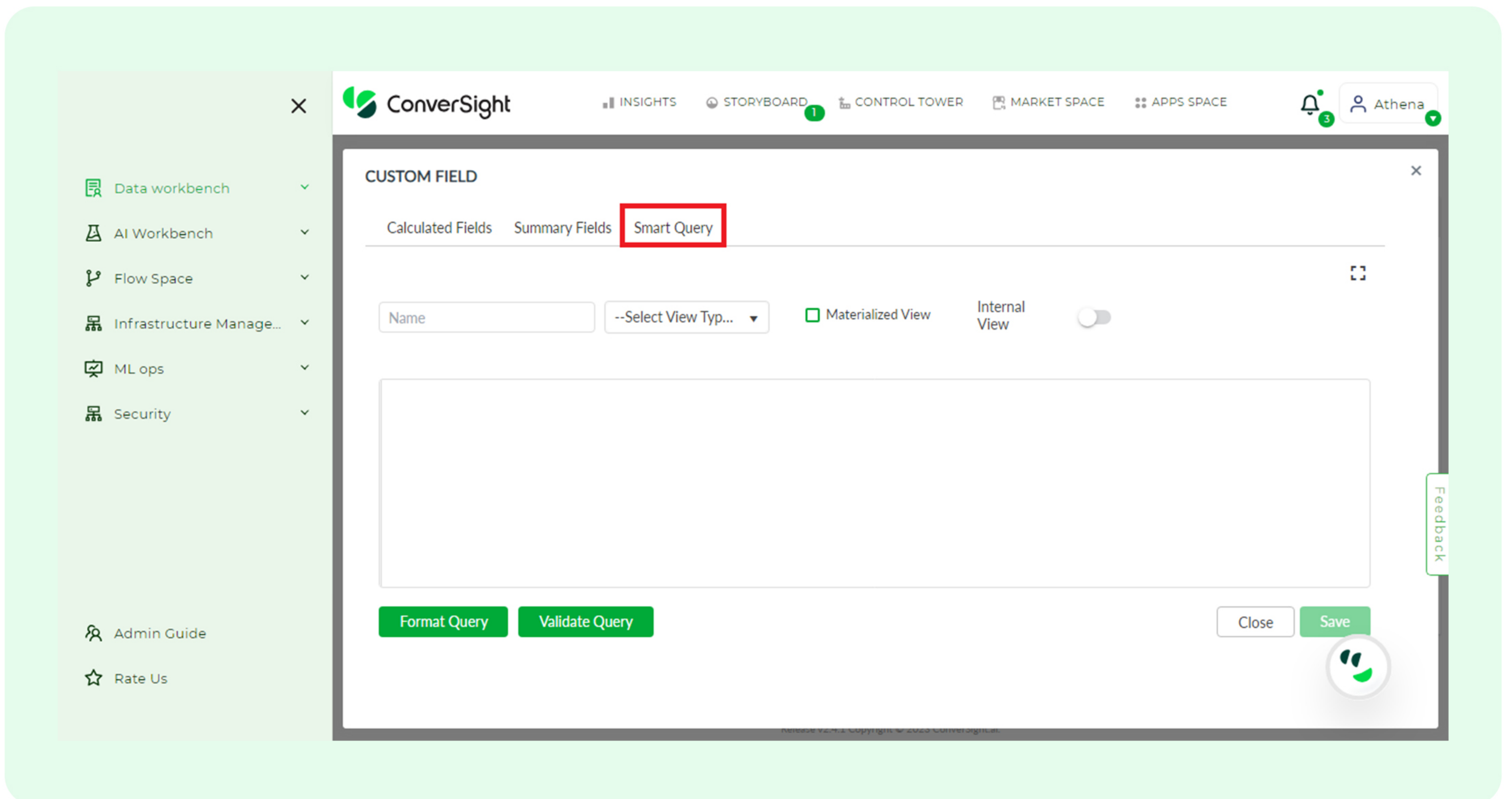


- Click on the **'Smart Query'** tab. In the Smart Query, you can create tables using two methods. The Internal View method connects to the ConverseSight database, while the External View method connects to the client's own database on the client's side.



## Note

Smart Query is initially set to Internal View by default.



## 2.1 Internal View

The Internal View of the platform offers users a range of powerful capabilities for accessing and customizing the tables available in the platform's database. With the inclusion of a category drop-down menu featuring two options, namely **'Reference'** and **'Materialized'**, users can further refine their search and tailor their data exploration.

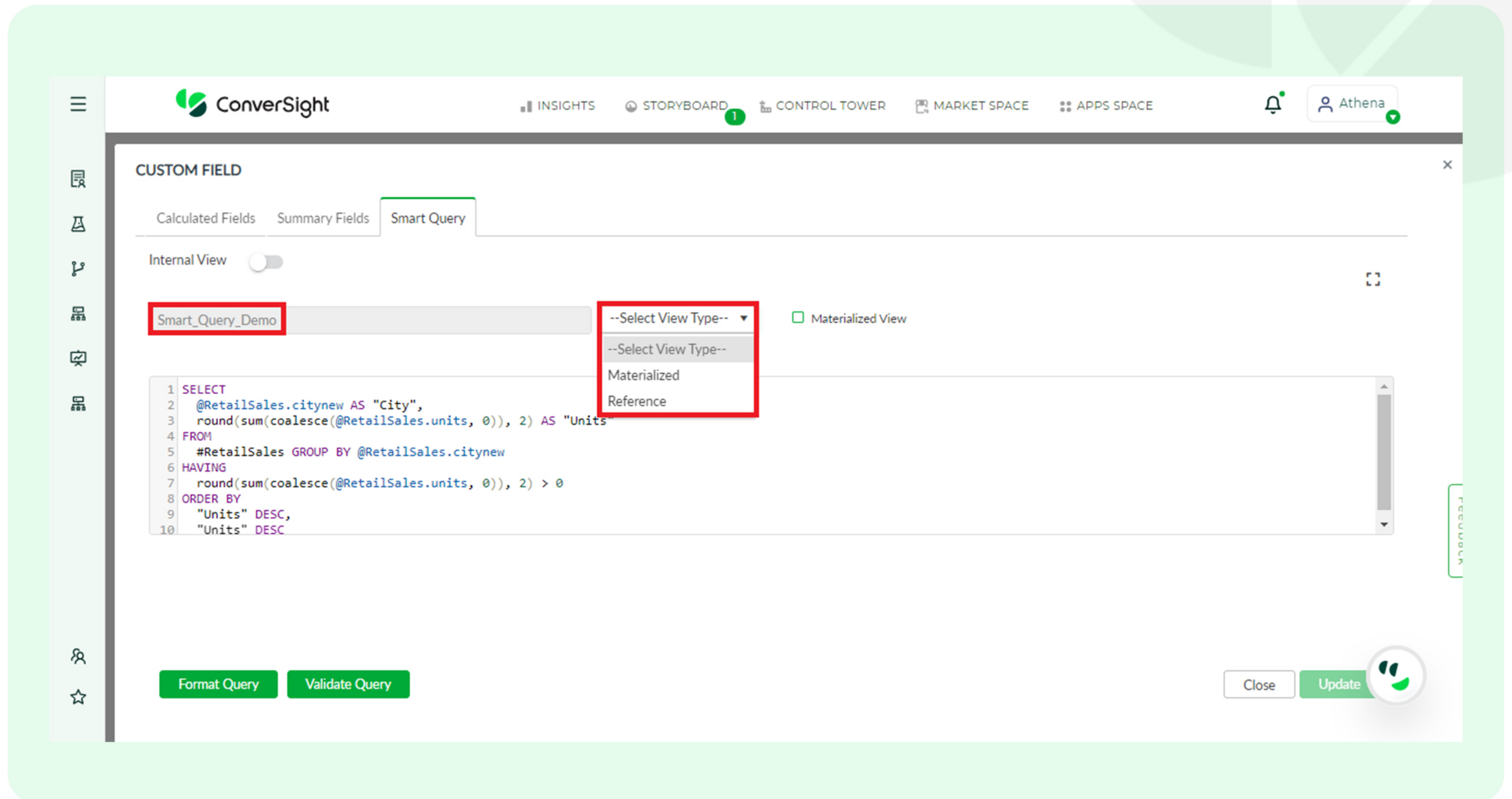
When opting for the **'Materialized'** option, the Smart Query data is loaded into the knowledge base and metadata, providing users with a comprehensive view of the data at hand. Conversely, by selecting **'Reference'**, users can create a view of the data without loading it into the knowledge graph and metadata. Moreover, users have the flexibility to choose the **'Materialized View'** checkbox. Enabling this option results in the creation of a new table in the database, allowing other users to utilize the custom query. On the other hand, if the checkbox remains unchecked, a reference table is generated that automatically updates with changes made to the original data. This option enhances flexibility and control, empowering users to manipulate and customize datasets according to their specific needs.



## 2.1.1 Creating an Internal View

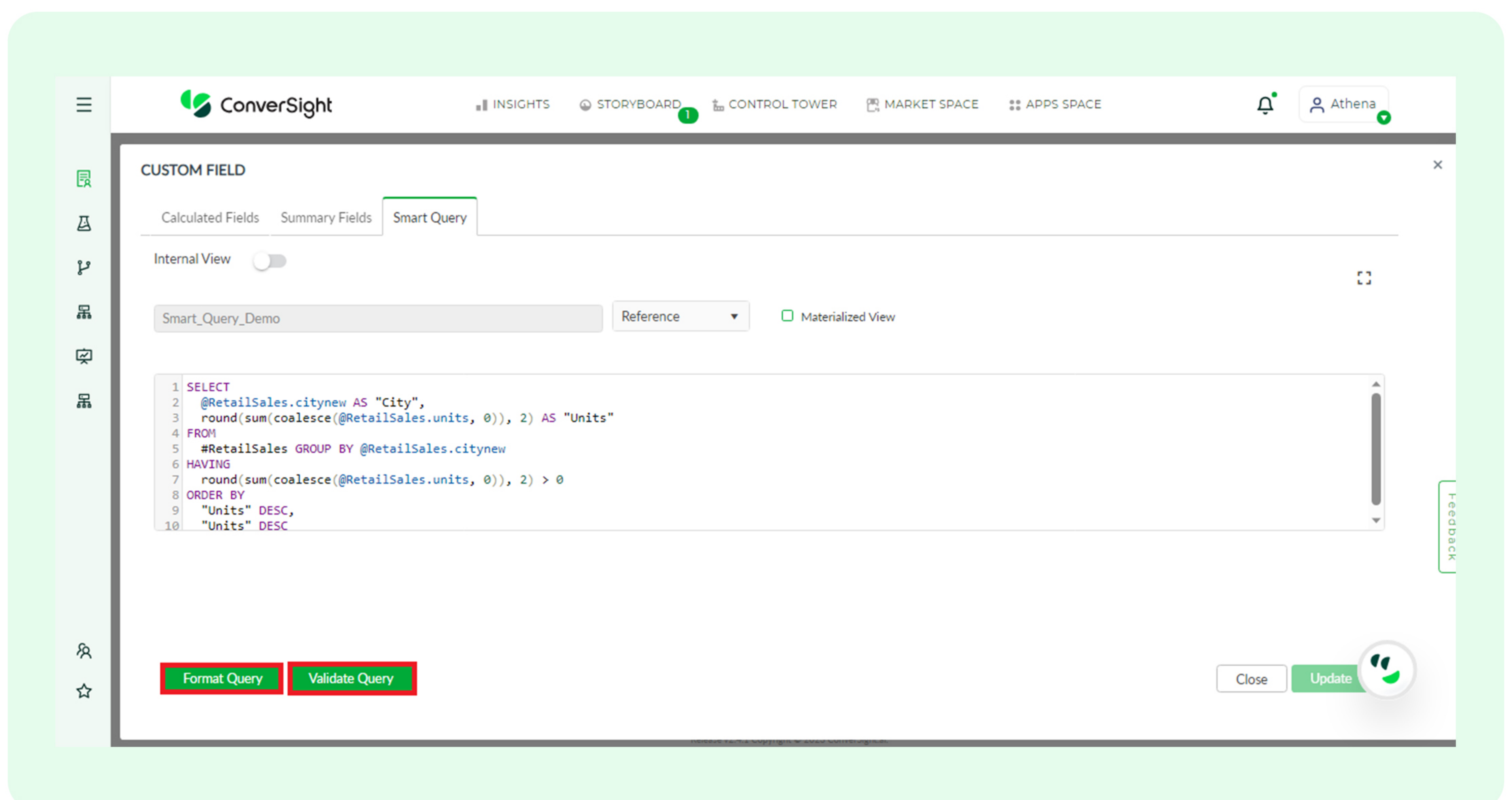
Sequential steps to create an Internal View of Smart Query are as follows;

- 1. Provide a name for your Smart Query and choose the View Type.



- 2. Enter the SQL query in the query space provided.

- 3. Click '**Format Query**' which formats the written query in a specified format and click '**Validate Query**' to ensure the query is accurate and error-free.





The screenshot shows the ConverseSight interface with a SQL query editor and a results table. The query is as follows:

```
1 SELECT
2   @RetailSales.citynew AS "City",
3   round(sum(coalesce(@RetailSales.units, 0)), 2) AS "Units"
4 FROM
5   #RetailSales GROUP BY @RetailSales.citynew
6 HAVING
7   round(sum(coalesce(@RetailSales.units, 0)), 2) > 0
8 ORDER BY
9   "Units" DESC,
10  "Units" DESC
```

The results table displays the following data:

City (STR)	Units (FLOAT)
Rochester	102445
Long Beach	100675
San Diego	96505
San Francisco	89730
Boston	87015
Cambridge	86281
Newark	74873
Lowell	74072
Jersey City	73573
Buffalo	73236

For example, below is a sample query which retrieves data from a table.

SELECT

@RetailSales.citynew AS "City",

round(sum(coalesce(@RetailSales.units, 0)), 2) AS "Units"

FROM

#RetailSales GROUP BY @RetailSales.citynew

HAVING

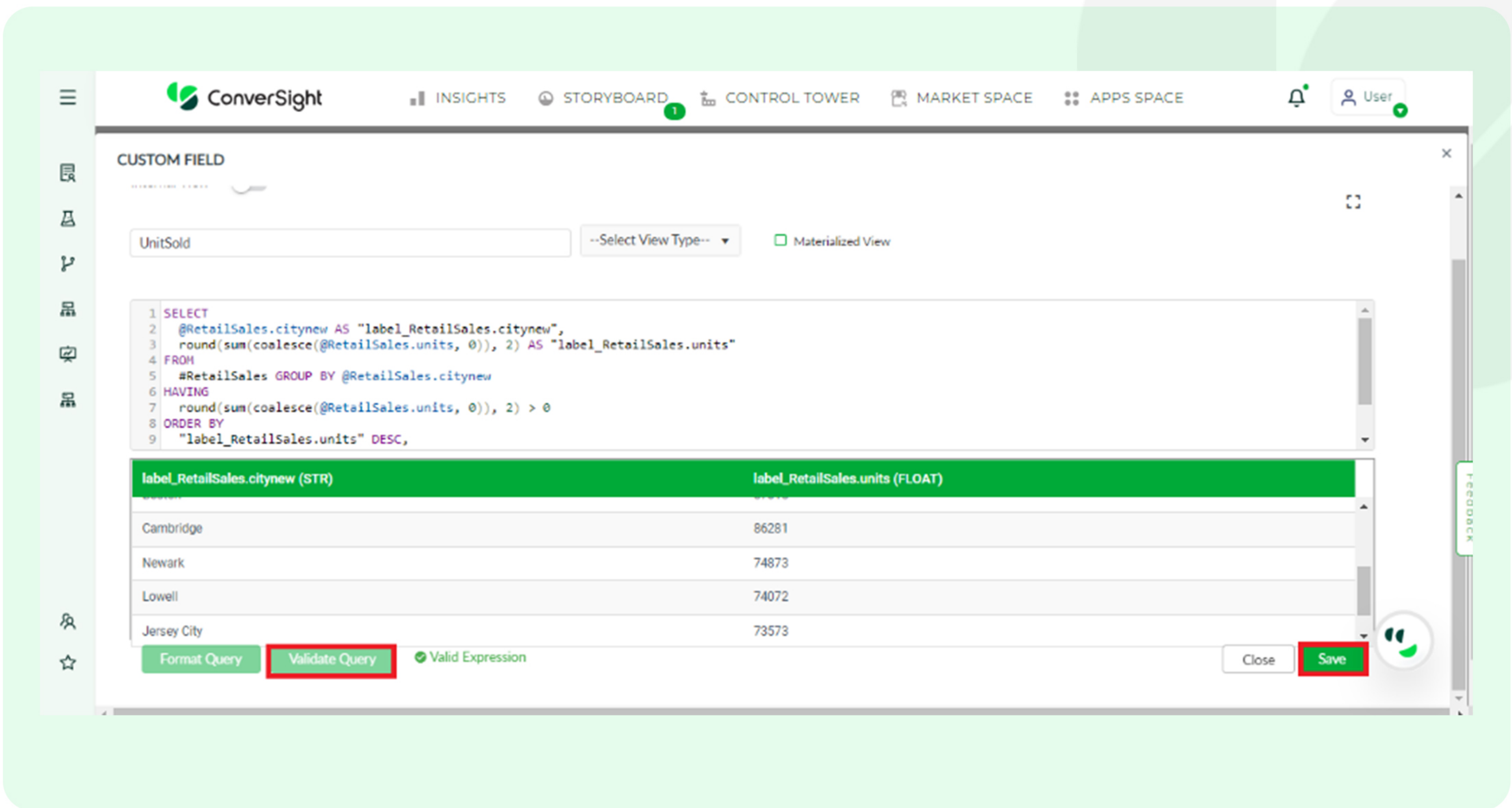
round(sum(coalesce(@RetailSales.units, 0)), 2) > 0

ORDER BY

"Units" DESC,

"Units" DESC

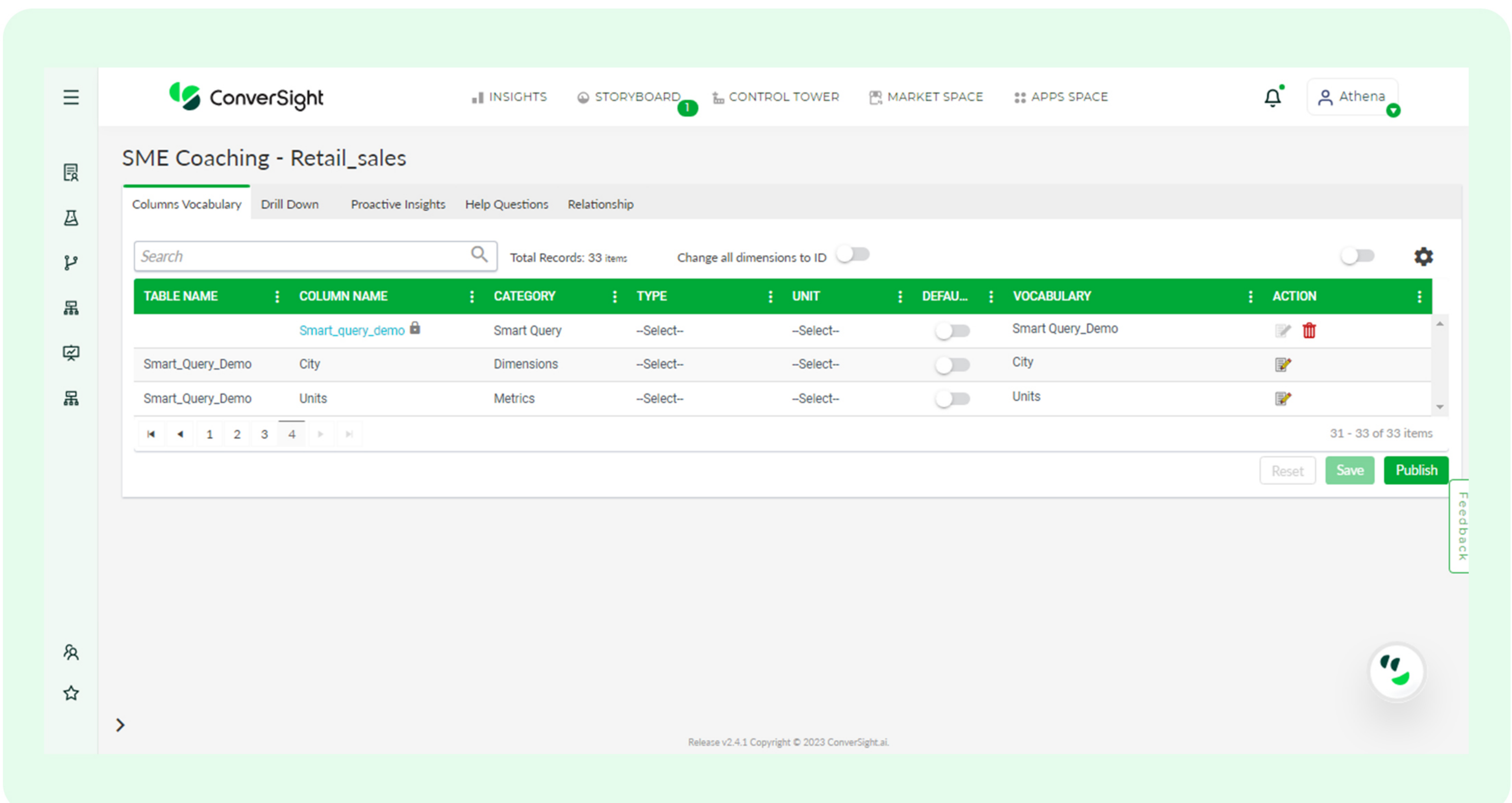




Once the query is executed, you can see the sample data in table format. click the **'Save'** button to generate your Smart Query. The page will now redirect to SME Coaching and your Smart Query is now ready to use. Click **'Publish'** to publish your Smart Query.

## Note

Smart Query name must begin with an alphabet or numeric and it can contain underscore.





The Smart Query table is safeguarded with a verification code (displays lock symbol) that can only be accessed by the Data Administrator. While users can view the column names and data types, any modifications can only be made by the Data Administrator since the Smart Query is protected. By adhering to these uncomplicated instructions, it is feasible for you to utilize a Smart Query in your enterprise and execute intricate analyses on your data table with ease. Such actions can assist you in making knowledgeable choices and obtaining a competitive edge in your field.

## 2.2 External View

External View grants users the ability to access datasets sourced from the client database. To establish a connection with the client database, users utilize Connectors that facilitate the extraction of data from its source location and subsequent writing to the destination location. Users have the option to compose queries in either Procedure or SQL format, depending on their specific requirements.

The Procedure format proves particularly advantageous in cases where the client's SQL remains confidential. In such instances, SQL is formulated as a function, enabling users to utilize the SQL through a function call. This format includes parameters that allow for the execution of the SQL. On the other hand, the SQL option grants users direct access to the client's SQL, providing a more straightforward approach to querying the client database.

### 2.2.1 Creating an External View

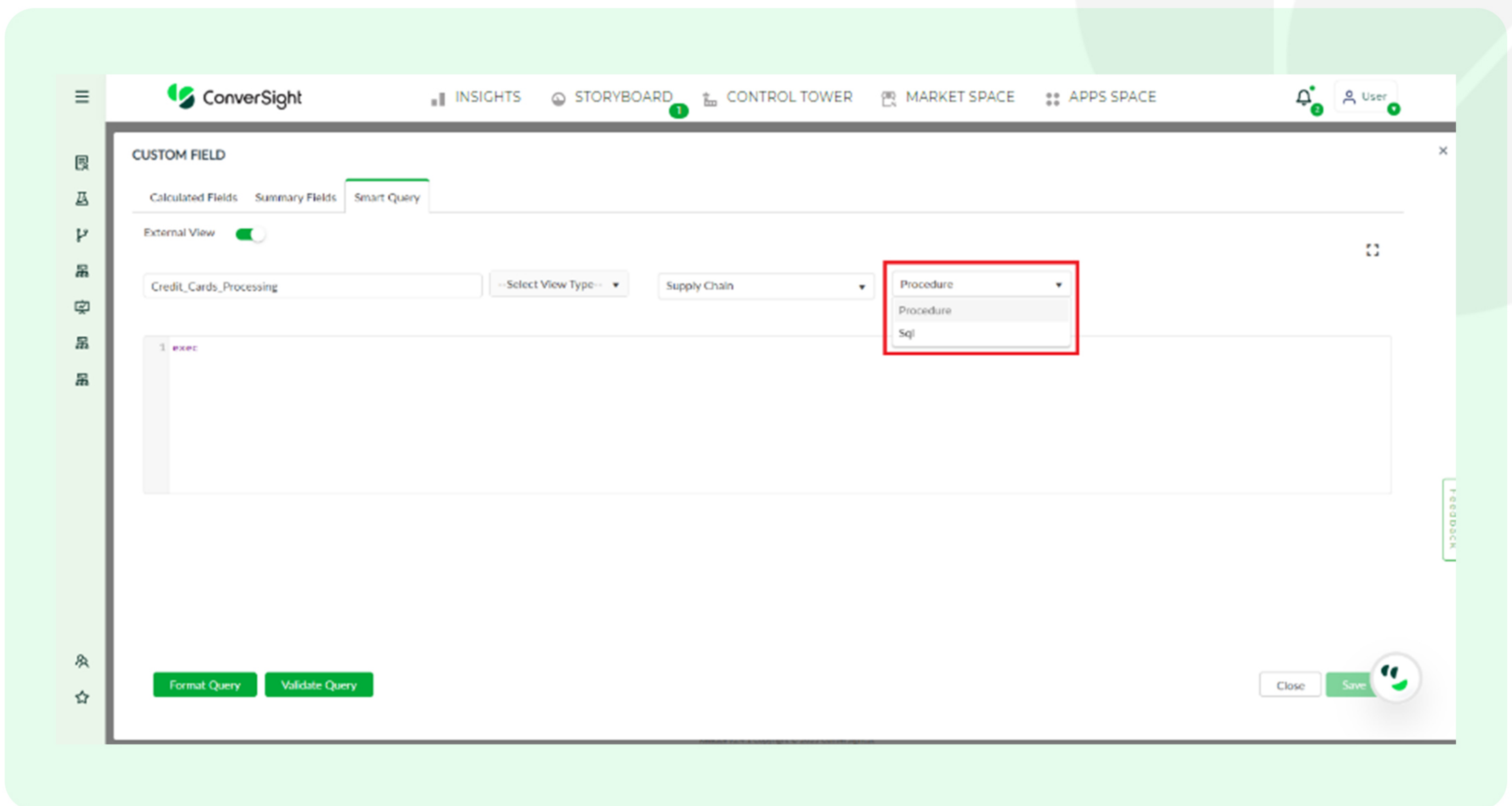
Sequential steps to create an External View of Smart Query are as follows

- Provide a name for your Smart Query and select the Connector of your client from the connectors list.

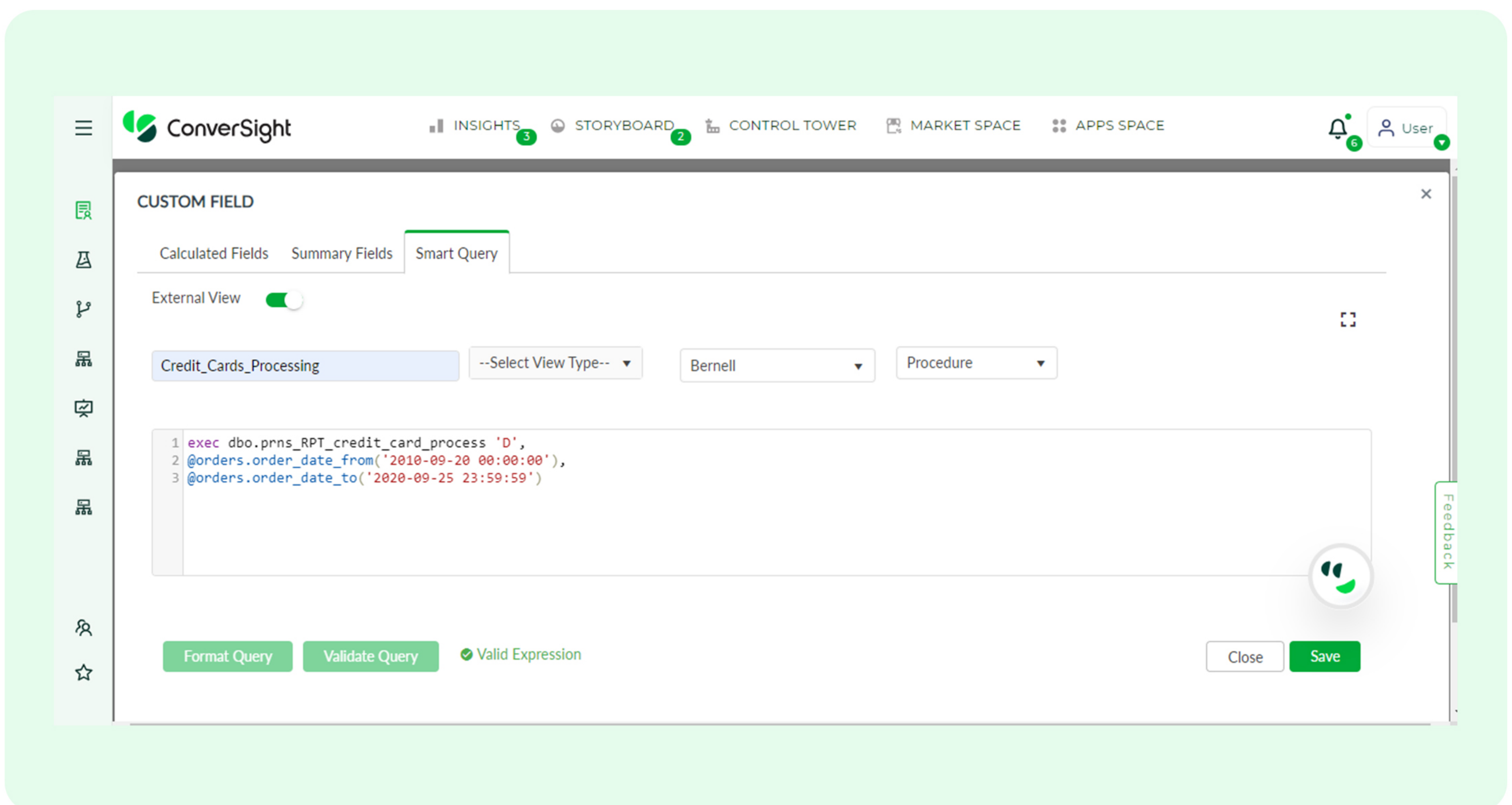
The screenshot displays the 'CUSTOM FIELD' configuration window in the ConverSight application. The 'Smart Query' tab is selected, and the 'External View' toggle is enabled. The 'Name' field is populated with 'Credit\_Cards\_Processing'. The 'View Type' dropdown is set to 'Procedure'. The 'Connector' dropdown is open, showing a list of 'SupplyChain' connectors. The interface includes a left sidebar with navigation icons, a top navigation bar with 'INSIGHTS', 'STORYBOARD', 'CONTROL TOWER', 'MARKET SPACE', and 'APPS SPACE', and a bottom bar with 'Format Query', 'Validate Query', 'Close', and 'Save' buttons.



- Once you have chosen the Connector, determine whether it is a Procedure or SQL.

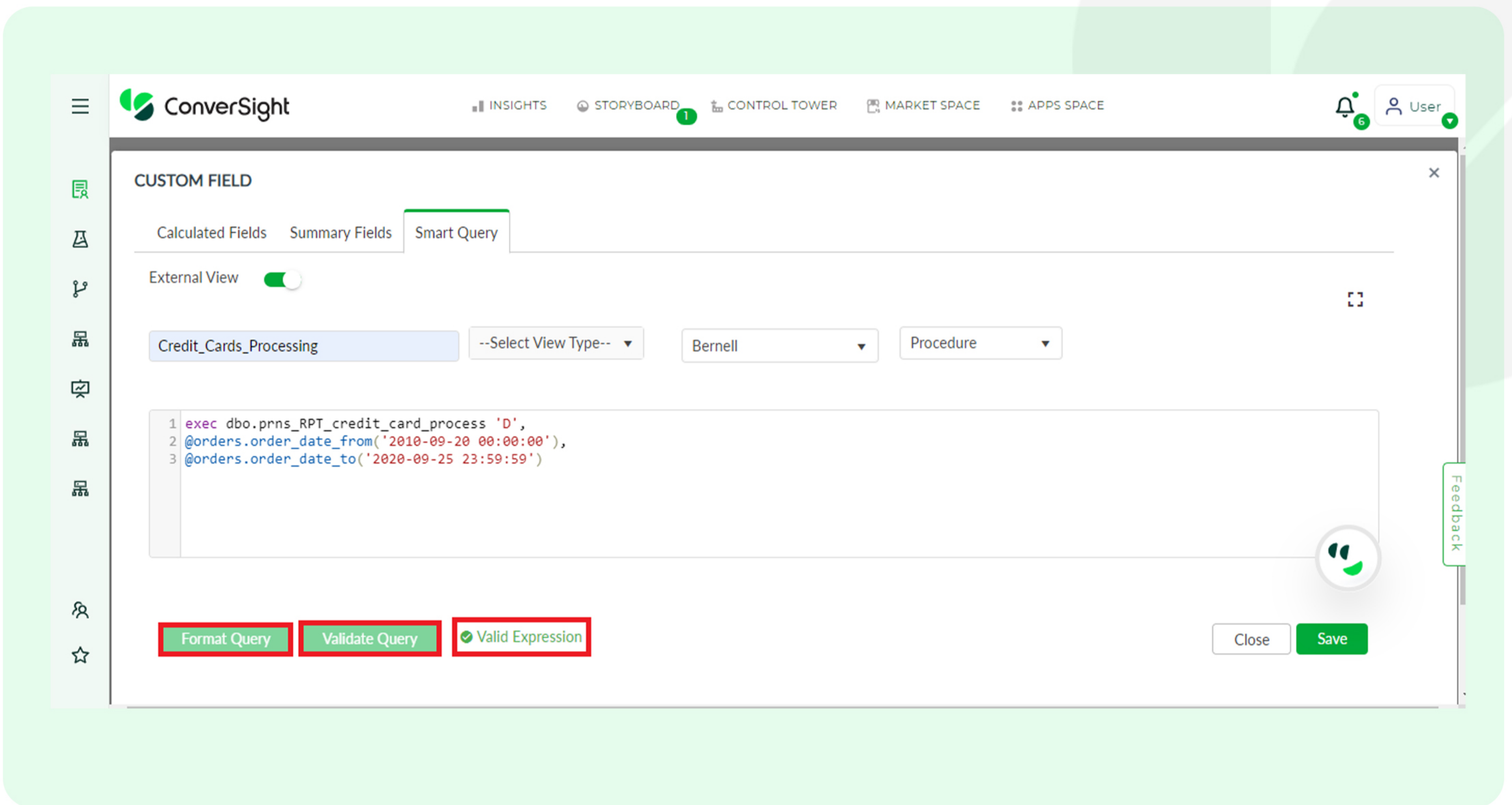


- Enter the SQL query to be executed in the query space provided.

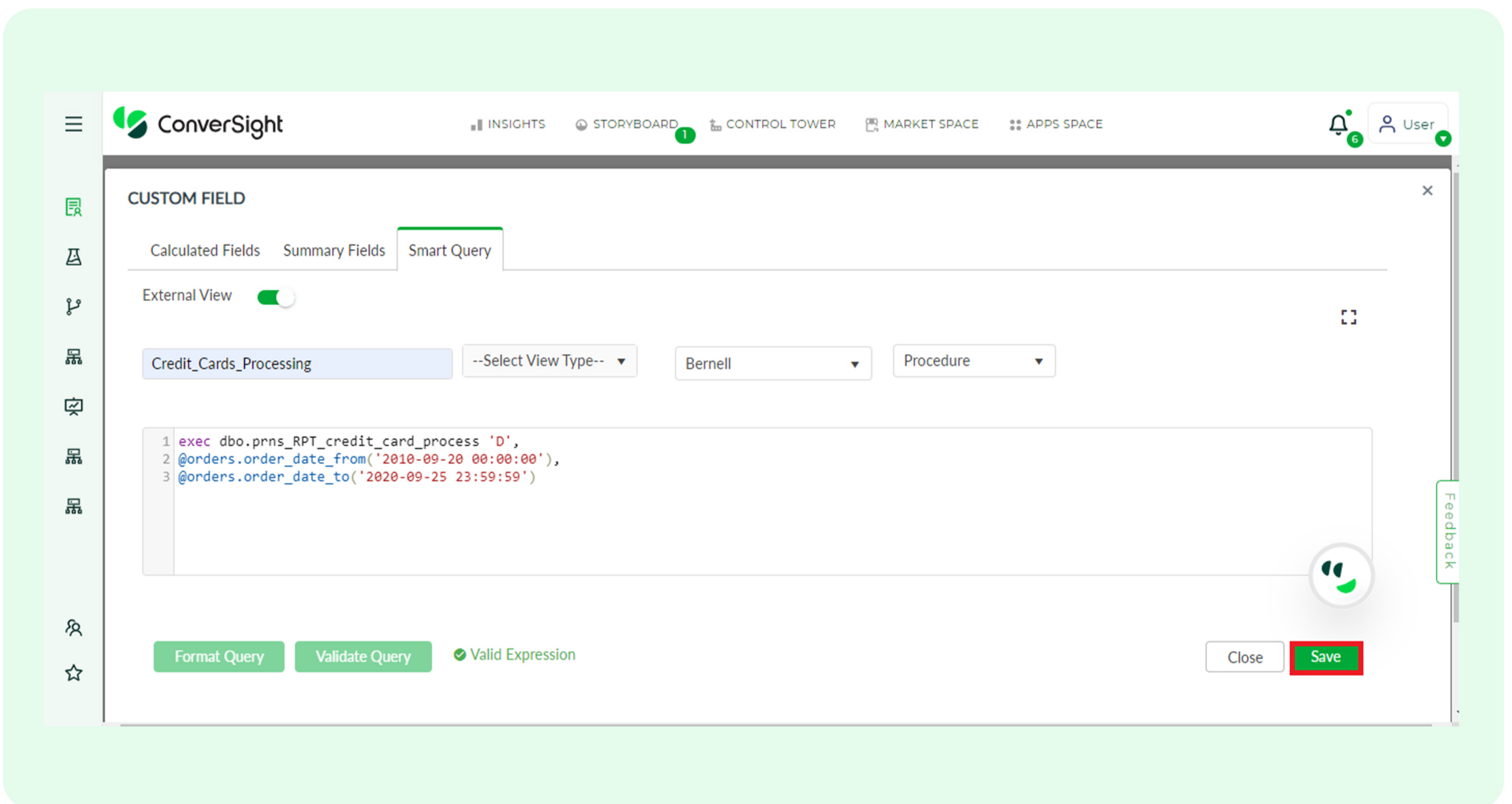


- Click **'Format Query'** which formats the written query in a specified format in ConverSight and click **'Validate Query'** to ensure the query is accurate and error-free. The process of verifying the query is performed within the database located on the client-side.





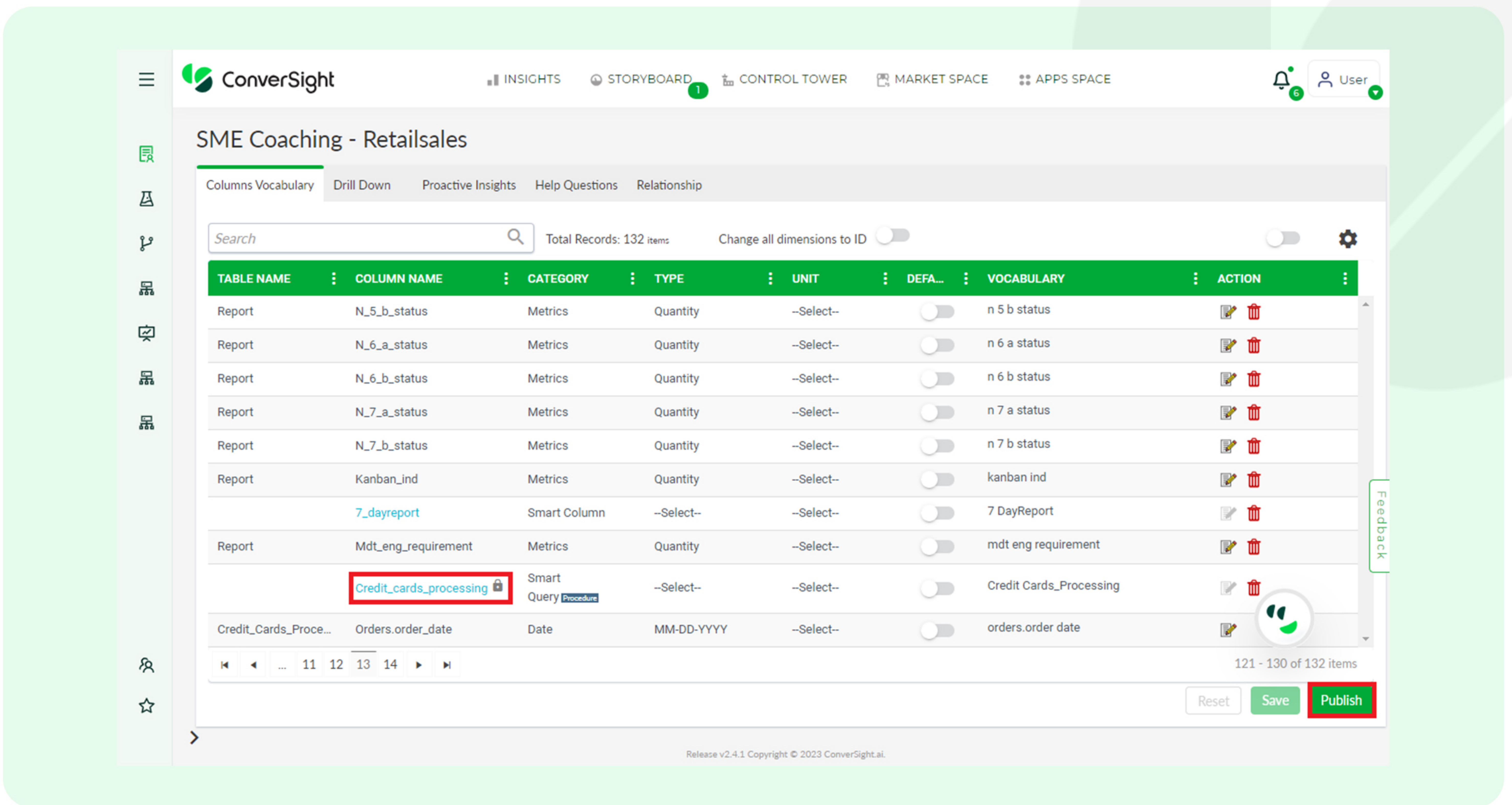
Once the selected field's results are displayed, click **'Save'** to save the Smart Query.



The page will now redirect to SME Coaching page, and your Smart Query is now ready to use.

Click **'Publish'** to publish your Smart Query.





### 3. Conclusion

In conclusion, the Smart Query feature within the ConverseSight platform offers a game-changing solution for data retrieval and analysis. Its user-friendly interface empowers users to create customized tables from both ConverseSight and client-side databases effortlessly. This transformative capability not only enhances data accessibility but also streamlines workflows, saves time and enables well-informed decision-making. By leveraging Smart Query, enterprises can harness the power of data more effectively, leading to improved productivity and better outcomes in their operations.



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### About ConverSight

ConverSight's Adaptive Analytics platform uses conversational AI, Natural Language Processing and machine learning to converge the distance between humans and data through data stories, presenting the meaning of data in the most effective, personalized and efficient form possible. ConverSight's patented AI business assistant, Athena, connects distributed databases to answer questions and Augment the consumers through 4 key functions: Information on demand, Automated Story Telling, Proactive Insights, and Recommended Actions.

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