

# Leverage AI in Cognos Analytics

Instructor – led lab guide

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## 1 Introduction

The goal of this lab is to showcase how AI is transforming the way you can explore and visualize data in Cognos Analytics.

### 1.1 What is Cognos Analytics?

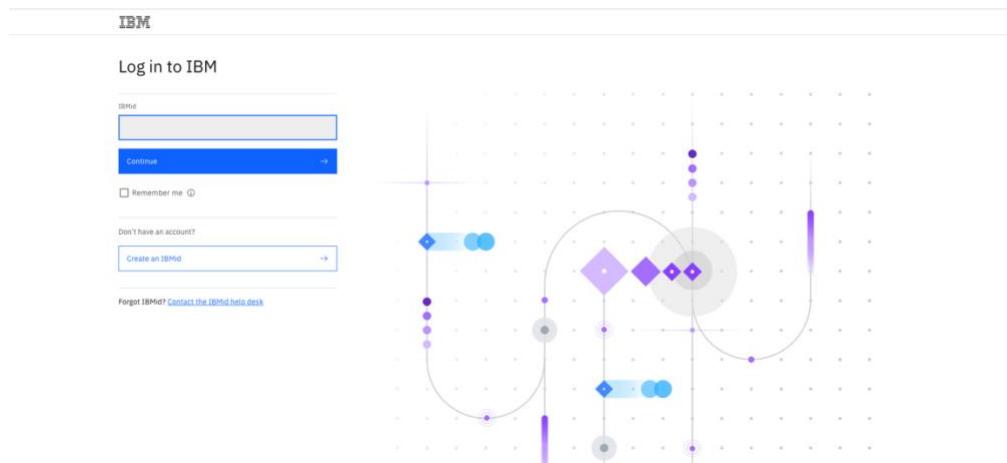
Cognos Analytics is a tool that helps organizations use data to provide the visibility and accountability needed. With Cognos Analytics, you can access, analyze, and distribute information about your organization to the people that need to be informed about and aligned on your priorities. One of the many components of the Cognos Analytics capabilities is natural language-based BI which we'll focus in on in this lab.

## 2 Cognos Analytics Assistant

### 2.1 Login to Cognos Analytics

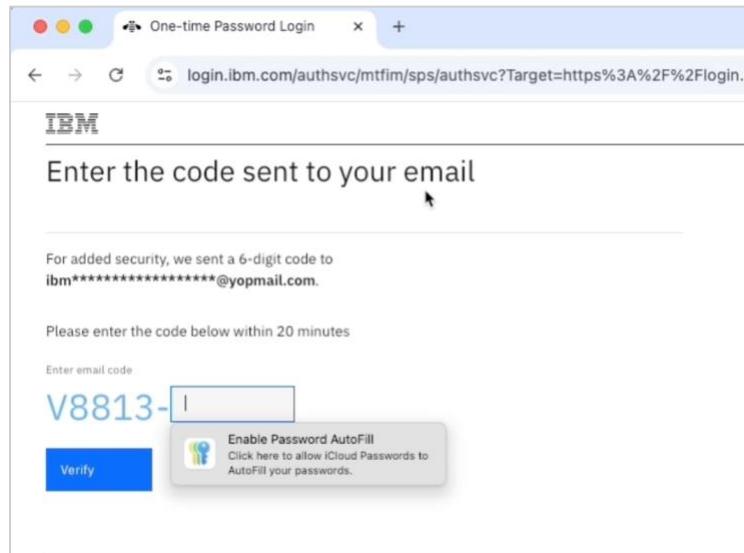
Participants will use a browser to access the lab environment. Launch IBM Cognos Analytics and login using the provided credentials.

- IBM Cognos Analytics url: <https://us1.ca.analytics.ibm.com/bi/?sbsSubscriptionID=514052169>
- Enter Username & Password provided

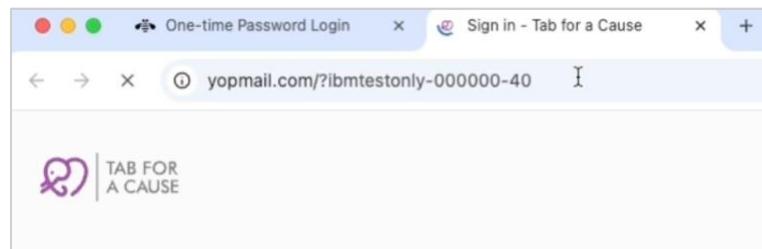


**Note:** If you're prompted for a verification code:

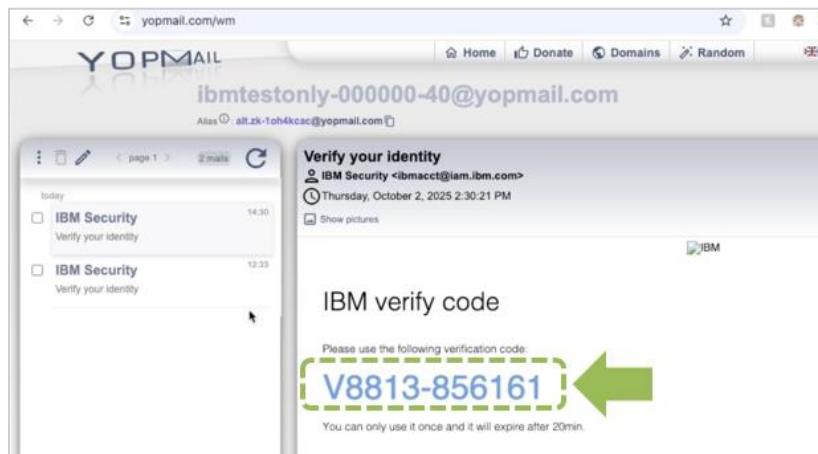
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- Go to **yopmail.com/?your\_username** in a separate browser tab.



- Retrieve the temporary IBM login code from your inbox.



- Copy the code and paste it into the IBM login prompt.
- Click **Continue** to complete the sign-in process.

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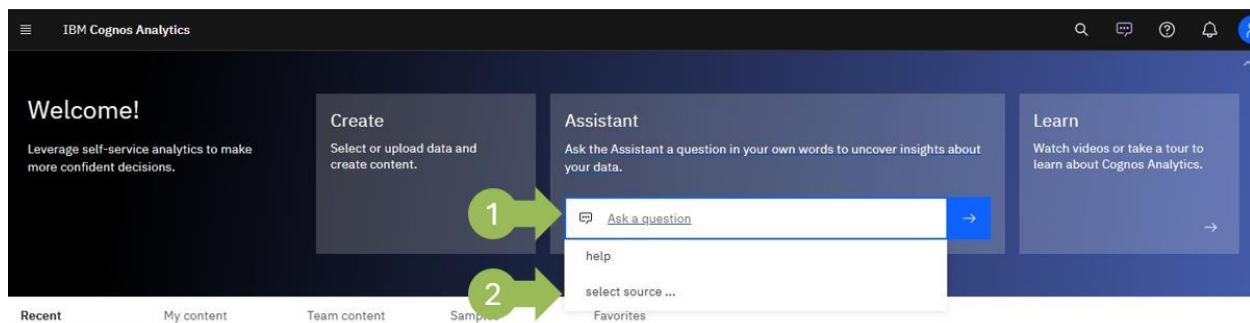
## 2.2 What is Cognos Analytics Assistant

The Cognos Analytics Assistant is a prompt-based assistant built into Cognos Analytics that allows you to interact with your data by typing questions. Instead of writing complex queries or manually creating visualizations, you can ask questions like “Show me sales by region” or “What are the top 5 products by revenue?” and the Assistant will automatically generate the most appropriate visualization or insight. This makes it easier for business users of all skill levels to quickly explore data, uncover trends, and build dashboards without needing deep technical knowledge.

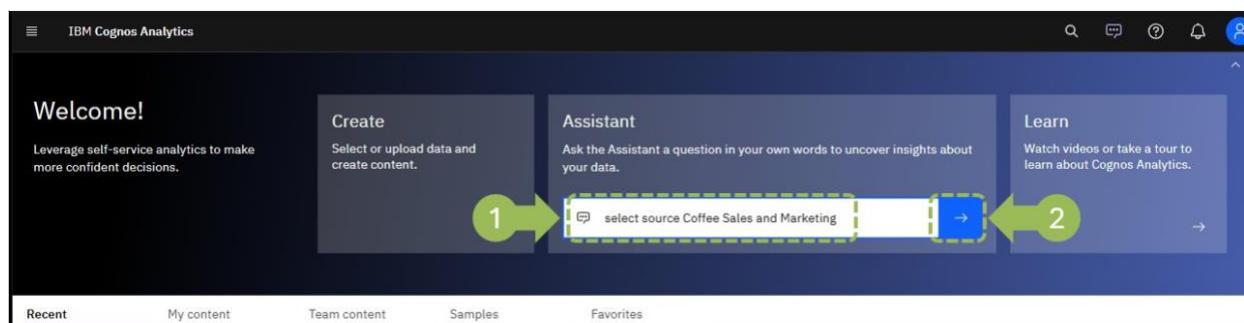
## 2.3 Let's Ask the Assistant Questions

Ask questions and let the Analytics Assistant build visualizations for you.

1. From the home page click on the Assistant black space. Then **Select source** prompt from the options list

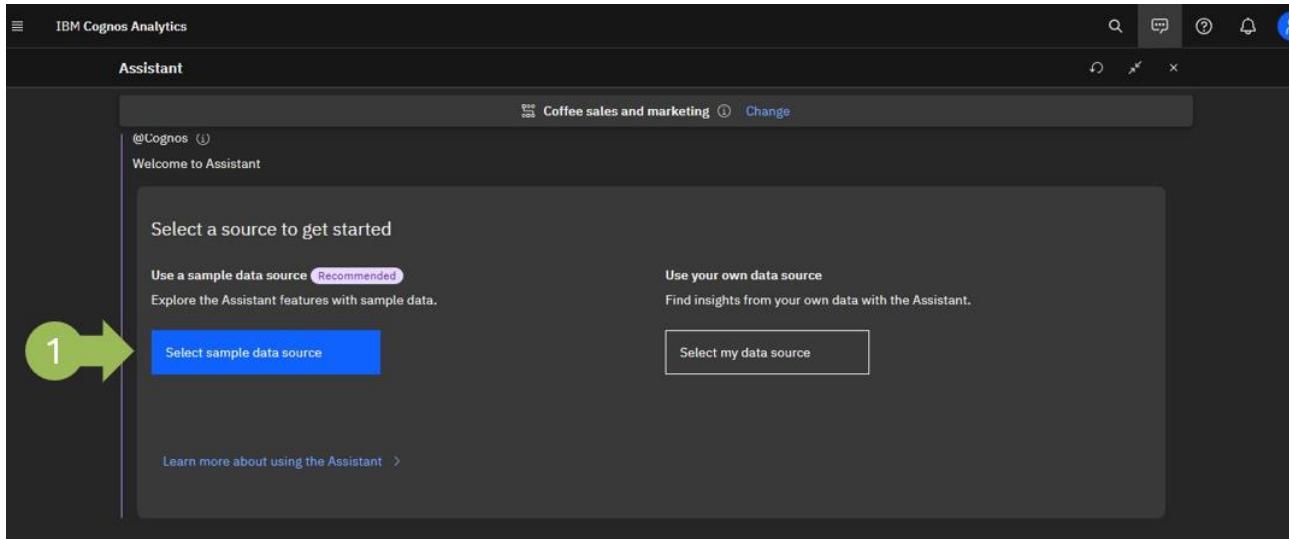


2. Type **Coffee Sales and Marketing** after it then hit enter.



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- Now the Assistant will take the full screen like this, then click in the **Select sample data source** action



- From the Data Sample options, you'll need to select the dataset stored in the Retail folder. To locate it, navigate through the breadcrumb trail at the top of the screen:

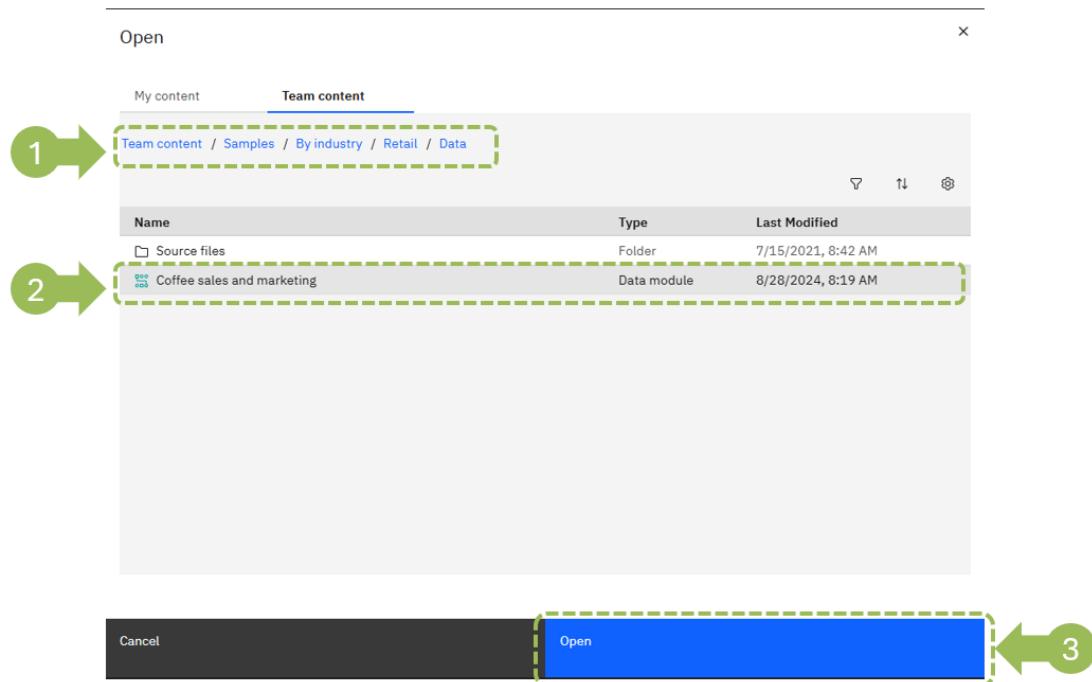
The screenshot shows an 'Open' dialog box. At the top, it says 'Open'. Below that, there are two tabs: 'My content' and 'Team content', with 'Team content' being the active tab. A green arrow points upwards from the breadcrumb trail towards the tabs. The breadcrumb trail shows the path: 'Team content' (highlighted with a dashed green box), 'Samples / By feature / Assistant'. The main area is a table with columns 'Name', 'Type', and 'Last Modified'. The table contains three items:

Name	Type	Last Modified
Shortcut to Call center	Shortcut	10/24/2023, 8:51 AM
Shortcut to Coffee sales and marketing	Shortcut	10/24/2023, 8:57 AM
Shortcut to Hospital admissions data module	Shortcut	10/24/2023, 9:03 AM

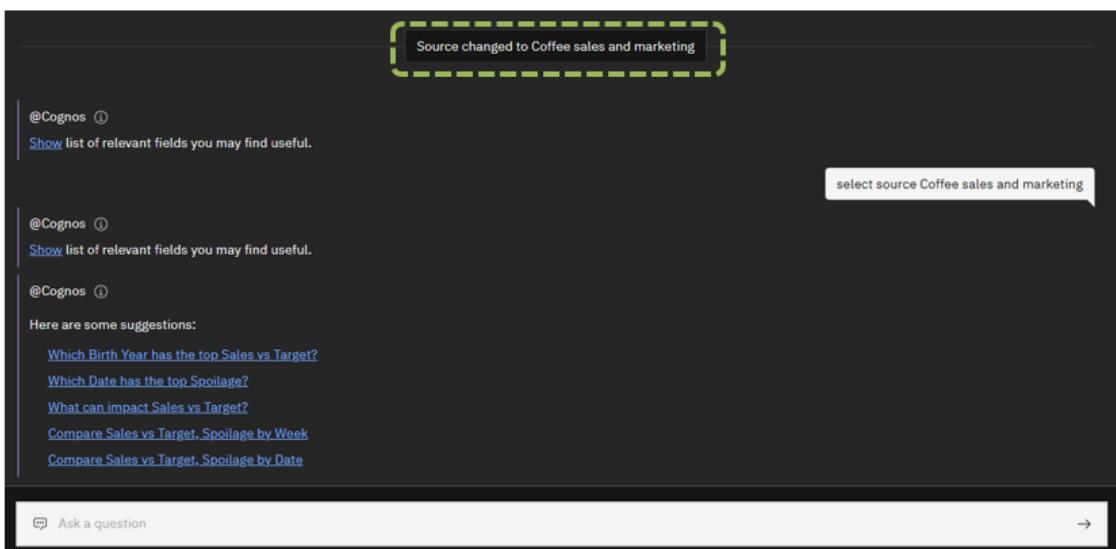
- Then follow this path: **Team Content → Samples → By Industry → Retail → Data**.

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- When you arrive at the destination folder, choose the **Coffee sales and marketing** data module and click **Open** to load it.



- After the Coffee sales and marketing data module loads, a confirmation message appears indicating that the data source has been successfully updated to **Coffee sales and marketing**. Below the confirmation, you'll see a list of suggestions automatically generated by the Assistant



- From this point, you can start exploring the Assistant's helpful features. Try clicking "Show list of relevant fields you may find useful"

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The screenshot shows a dark-themed interface with a list of fields. At the top right, a button says "Source changed to Coffee sales and marketing". Below it, a message says "@Cognos ⓘ Show list of relevant fields you may find useful." A green dashed box highlights the first item in the list: "Sales vs Target". A large green arrow points from this highlighted item to the left. To the right, another button says "select source Coffee sales and marketing". The list of suggestions includes:

- Which Birth Year has the top Sales vs Target?
- Which Date has the top Spoilage?
- What can impact Sales vs Target?
- Compare Sales vs Target, Spoilage by Week
- Compare Sales vs Target, Spoilage by Date

At the bottom, there's a "Ask a question" button and a right-pointing arrow.

9. This action shows a table listing all available fields and their context from the dataset. From the list, click **Sales vs Target** to explore that metric.

The screenshot shows a table with two columns: "Fields" and "Concepts". A green dashed box highlights the "Sales vs Target" entry in the "Fields" column. A large green arrow points from this highlighted item to the left. The table data is as follows:

Fields	Concepts
<a href="#">Sales vs Target</a>	Continuous, Measure, Revenue, Planned
<a href="#">Spoilage</a>	Continuous, Measure
<a href="#">Beverages</a>	Continuous, Measure

At the bottom right, there's a "Show more" link.

10. This expands the details for Sales vs Target, showing related fields and an option to explore what affects this measure. Click **Show influencers** to see which factors are influencing this metric.

The screenshot shows detailed information for the "Sales vs Target" field. At the top right, a button says "show Sales vs Target". The main content area starts with "@Cognos ⓘ From source Coffee sales and marketing, here is some information about Sales vs Target:". Below this, a table shows:

Usage	Measure
Aggregate	Calculated
Data type	Decimal
Concepts	Continuous, Measure, Revenue, Planned

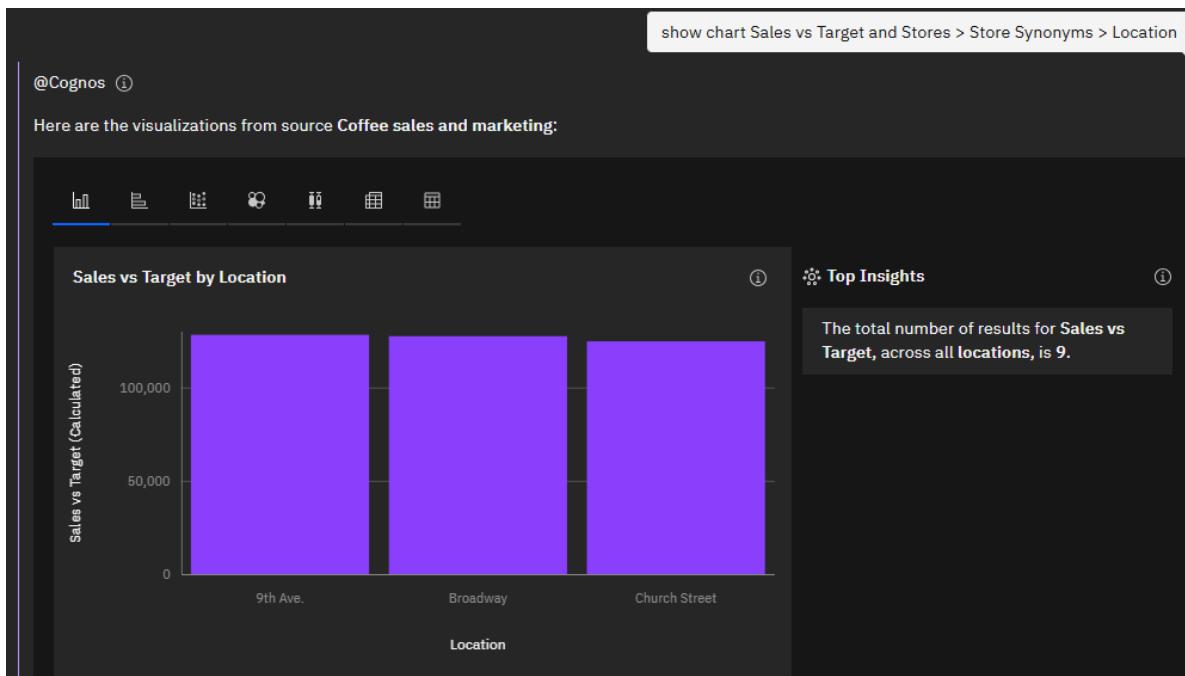
Below the table, it says "and here are some interesting fields related to Sales vs Target in source Coffee sales and marketing. Select one to explore in more detail." A list of related fields is provided:

- [Products > Retail Price](#)
- [Sales Receipts > Unit Price](#)
- [Products > Wholesale Price](#)
- [Customers > Customer Since Date](#)
- [Customers > Birth Year](#)

At the bottom left, a green dashed box highlights the "show influencers" link. A large green arrow points from this highlighted link to the left. The text below the link says "Enter or click show influencers to see if there are any fields that might influence Sales vs Target."

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11. For example, clicking **Stores > Store Synonyms > Location** displays a chart titled **Sales vs Target by Location**, showing how performance varies across different store locations

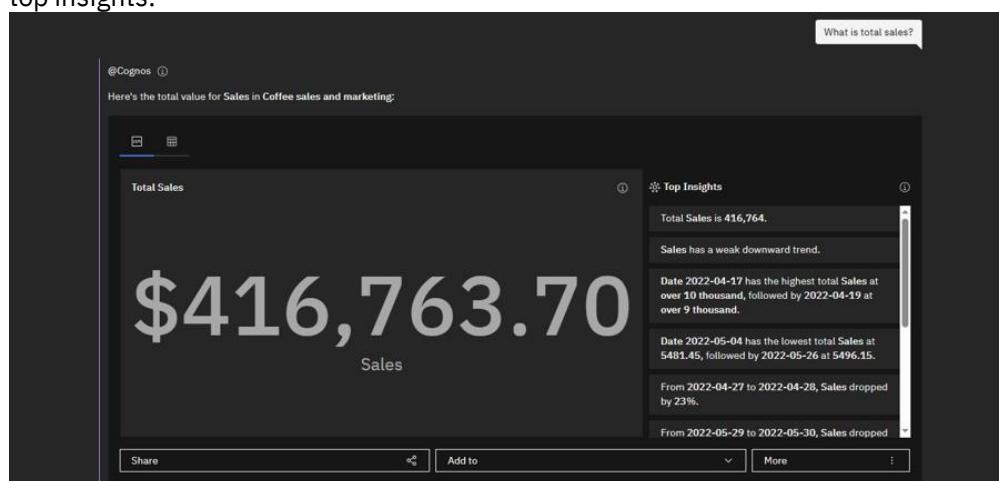


12. Now that the setup is complete, let's start exploring the **Coffee sales and marketing** dataset through natural language questions.

Type or say: **What is total sales?**



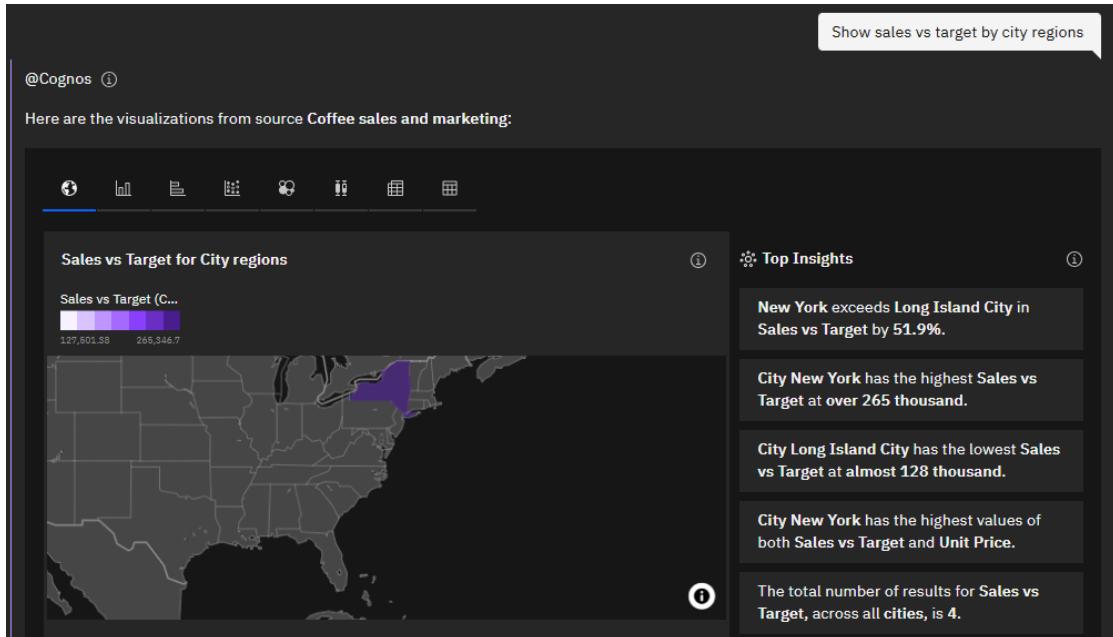
13. Here's how the answer to your question should appear: it shows the figure along with a clear list of the top insights.



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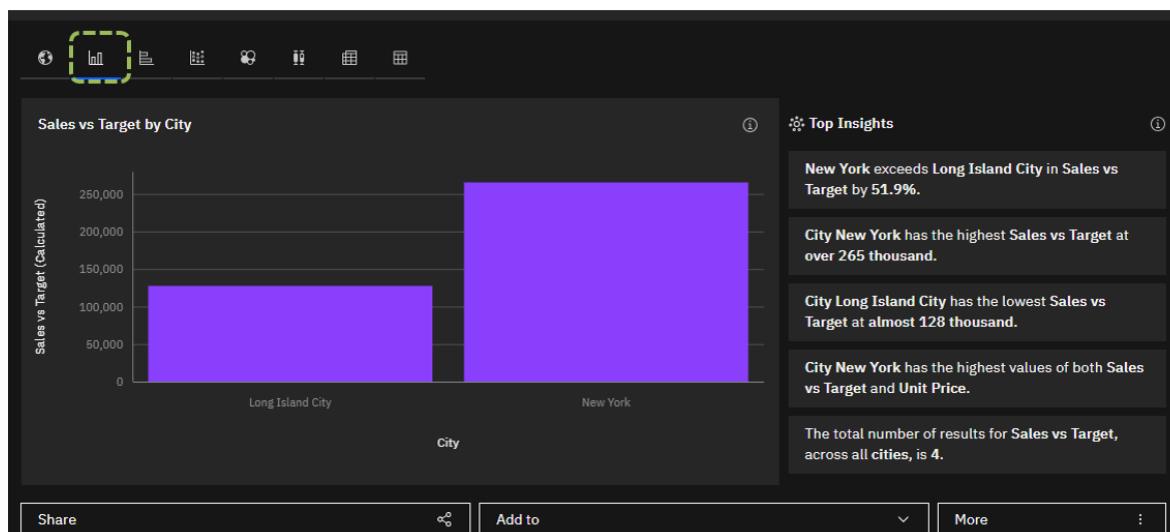
14. Ask the assistant another question to explore the data further.

Type **Show sales vs target by city regions** this command retrieves total sales figures and organizes them by store and colored by city, allowing you to compare store performance. It's a simple way to visualize geographic sales trends.



**Pro tip: The Assistant works best if you use suggested prompts.**

15. You can explore different visualizations suggested by the system. Click the Chart type icon on the toolbar to switch between chart styles and see which one best represents your data.



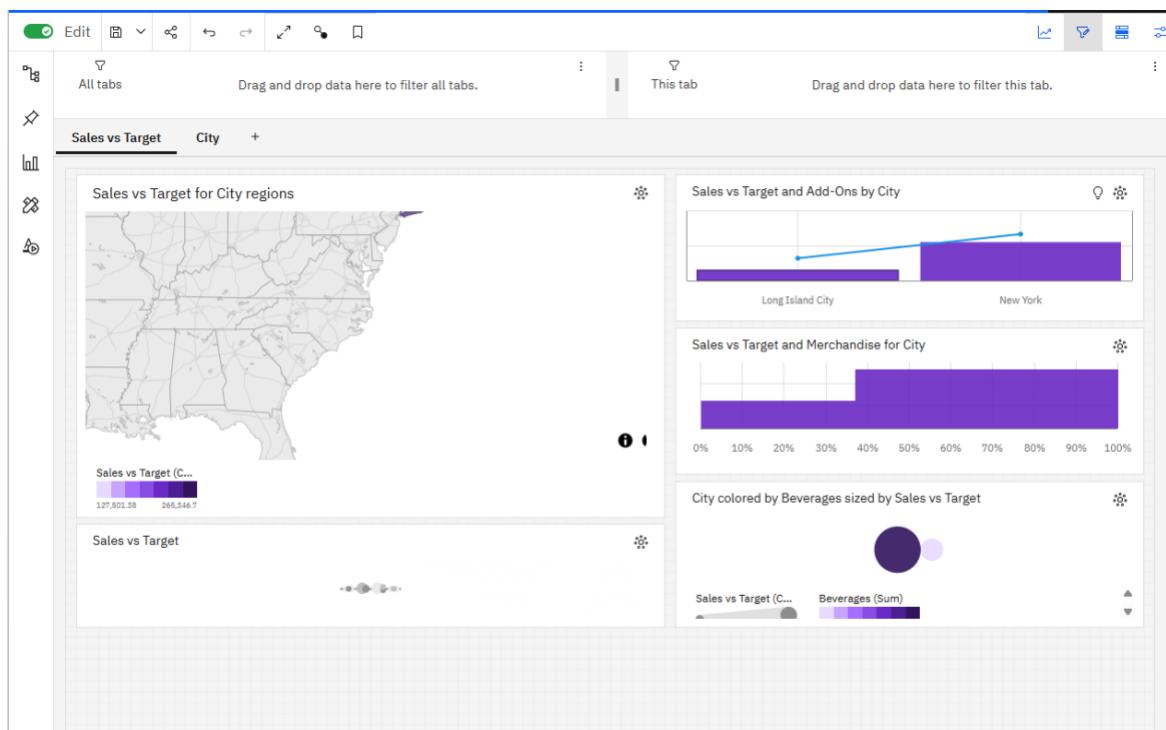
## 2.4 Generate Dashboard

16. Go back to the first tab, then find the **Sales vs Target by City/Region** map chart result. Open the **More** menu in the Assistant panel and select **Create Dashboard from the chart** option.

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The screenshot shows the IBM Watson Studio interface. A green arrow labeled '1' points to the top navigation bar, specifically the 'Visualizations' icon. Another green arrow labeled '2' points to the 'More' button in the bottom right corner of the dashboard header, which is highlighted with a dashed blue box. A third green arrow labeled '3' points to the 'Create dashboard from the chart' option in the dropdown menu that appears when the 'More' button is clicked.

17. You'll see a new dashboard automatically created, displaying data organized by product type and sales



## 3 Preview: Agentic AI In Cognos

Now we are entering a new era in the BI space where AI + BI is becoming increasingly prominent, and more specifically, where Generative BI is emerging as the next evolution, fundamentally reshaping how business users interact with data.

The way we are addressing this need is through purpose-built analytics agents that collaborate to streamline the entire workflow from creation to understanding, recommendation, and sharing.

As part of this evolution, four core **Agents** are coming together:

- **Reporting agent** handles the creation of new reports. It understands natural language prompts to define rows, columns, and measures, focusing initially on crosstab visualizations. Over time, it will expand to support additional visual types, customization, editing directly within conversation.
- **Summarization agent** interprets and explains results. It produces concise, meaningful summaries that help users understand reports. It is evolving to handle follow-up questions, making it easier to explore insights conversationally.
- **Recommendation Agent** helps users discover relevant reports, data, and visualizations based on context and intent. Over time, it will grow into a full discovery layer, offering smarter search, ranking, and workspace-wide retrieval.
- **Sharing agent** focuses on distribution and currently supports email and slack (not enabled in this workshop) as the initial channels. It will evolve into a broader communication layer that connects insights across different platforms and collaboration tools.

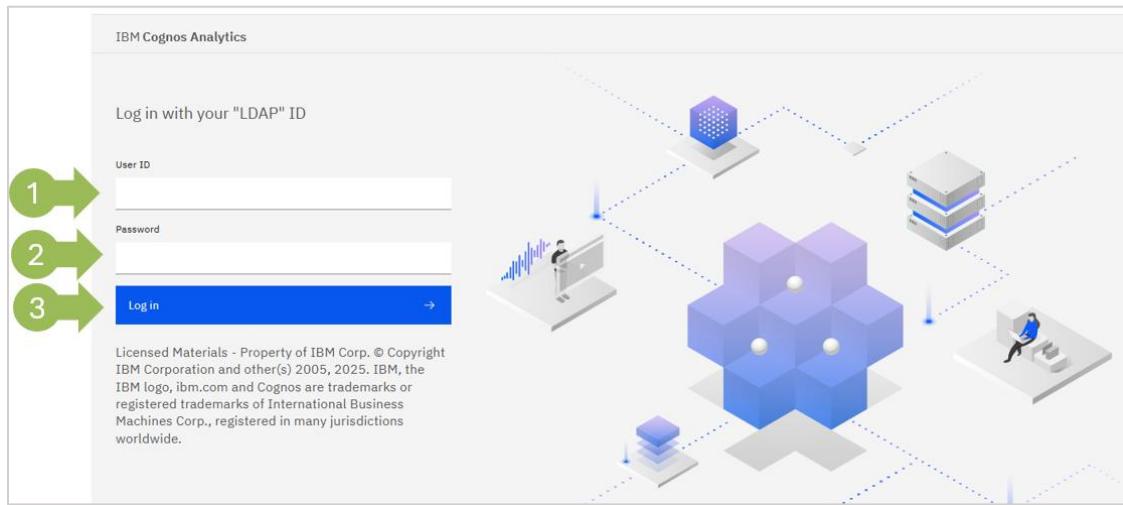
And most importantly, these agents are not working in silos. They are orchestrated and designed to work together across jobs to be done. That's what makes this approach powerful: it redefines the analytics experience for all users, meeting them where they are while ensuring organizations can scale insight responsibly.

### 3.1 Log In

**Currently the below agents are in preview, therefore we need to log into a different environment.**  
Participants will use a browser to access the lab environment.

18. IBM Cognos Analytics Agentic BI url: <https://techx-25.analytics-devlab-nonprod.w3cloud.ibm.com/bi/?CAMNamespace=LDAP>
19. Enter Username & Password provided
  - If presented with choice of Namespace in the log in screen, select “LDAP”

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## 3.2 Let's ask Cognos Agentic AI to Summaries a Report for me

20. On the home page, navigate to Samples, then choose By Industry.

The image shows the IBM Cognos Analytics home page. At the top, there are four main sections: 'Welcome!', 'Create', 'Assistant', and 'Learn'. Below these is a navigation bar with tabs: 'Recent', 'My content', 'Team' (which is highlighted with a green arrow labeled '1'), and 'Favorites'. The 'Samples' tab is also highlighted with a green arrow labeled '1'. The main content area displays a list of prebuilt samples. One sample is expanded to show details: '\* Get started' (Last Modified 7/16/2021, 8:55 AM), 'By business function' (Last Modified 6/26/2020, 10:55 AM), 'By feature' (Last Modified 2/13/2024, 12:55 PM), and 'By industry' (Last Modified 12/15/2020, 1:00 PM). A green arrow labeled '2' points to the 'By industry' sample.

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21. In the list of industries, click **Automotive** to access the sample assets for that sector.

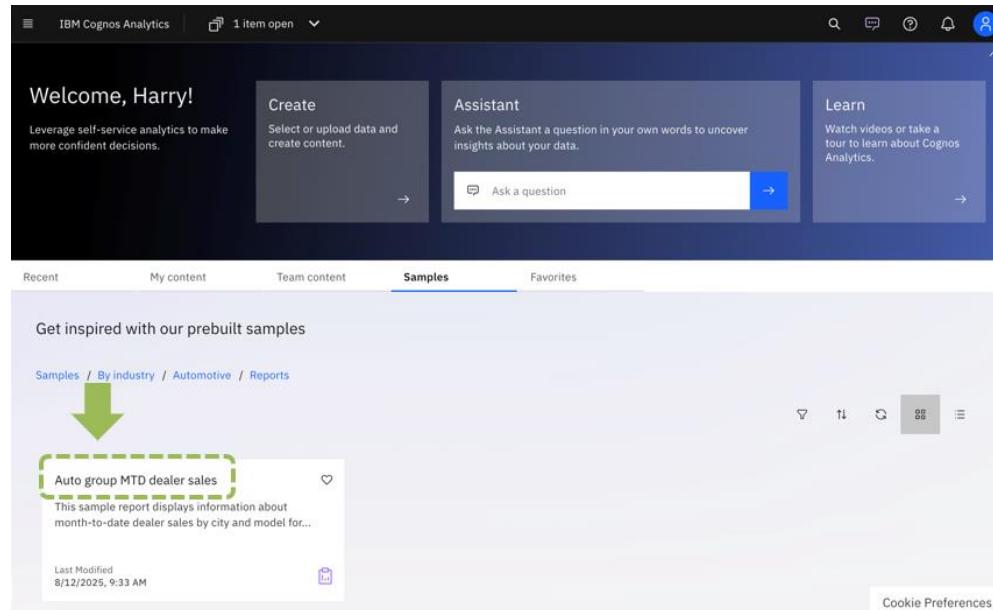
The screenshot shows the IBM Cognos Analytics interface. At the top, there's a dark header bar with the title 'IBM Cognos Analytics'. Below it is a main content area with four sections: 'Welcome!', 'Create', 'Assistant', and 'Learn'. The 'Samples' tab is selected at the bottom of the navigation bar. A large section below is titled 'Get inspired with our prebuilt samples' and shows a grid of industry samples. One item, 'Automotive', is highlighted with a green dashed box and a green arrow pointing to it. Other industries listed include Banking, Education, Finance, Financial markets, Healthcare, Industrial manufacturing, Insurance, Professional services, Retail, Telecommunications, and Travel and transportation. Each item has a last modified date and a folder icon.

22. Next, open **Reports**.

This screenshot shows the same IBM Cognos Analytics interface as the previous one, but with a different focus. The 'Samples' tab is still selected. The main content area now displays a grid of report categories. One category, 'Reports', is highlighted with a green dashed box and a green arrow pointing to it. Other categories include Dashboards, Data, Explorations, and Stories. Each category has a last modified date and a folder icon.

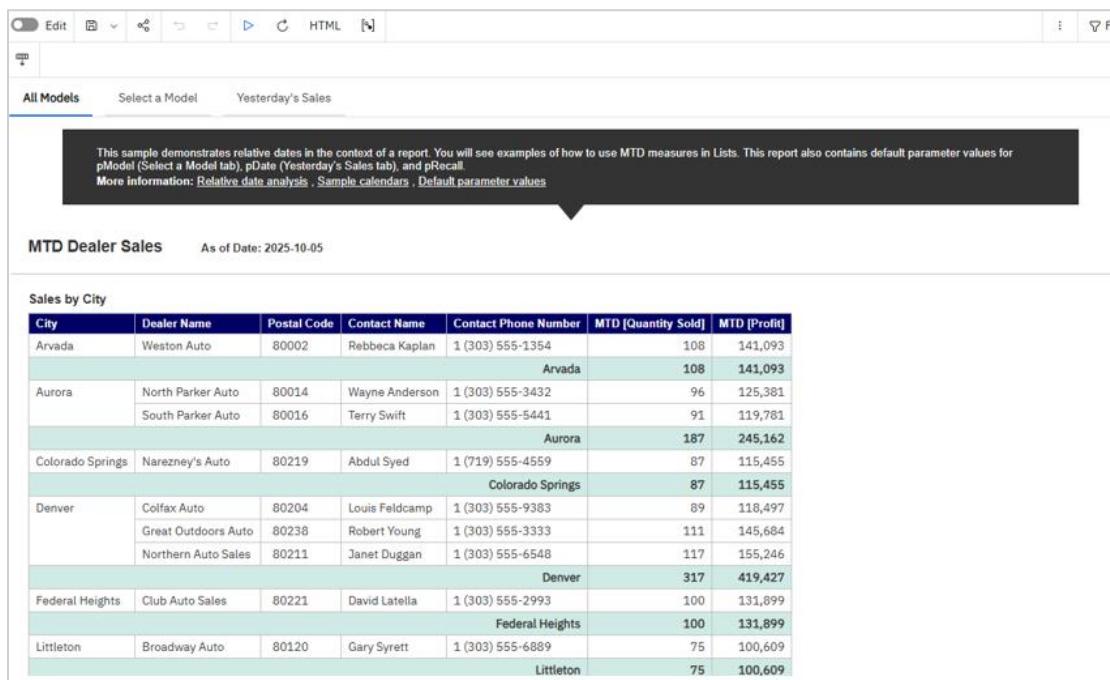
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23. Finally, select the **Auto Group MTD Dealers Sales** report to view it.



The screenshot shows the IBM Cognos Analytics interface. At the top, there's a dark header with the IBM logo, a search bar, and various navigation icons. Below the header, there are four main sections: 'Welcome, Harry!', 'Create', 'Assistant', and 'Learn'. The 'Samples' tab is highlighted in blue at the bottom of the header. Under the 'Samples' tab, there's a section titled 'Get inspired with our prebuilt samples' with a green arrow pointing to a card for 'Auto group MTD dealer sales'. The card includes a brief description and a 'Last Modified' timestamp of 8/12/2025, 9:33 AM. On the right side of the interface, there are some filter and search options.

24. When the report loads, you should see a table titled MTD Dealer Sales. It shows data grouped by City, with details for Dealer Name, Postal Code, Contact Name, Contact Phone Number, and two key metrics: MTD [Quantity Sold] and MTD [Profit]



The screenshot shows the 'MTD Dealer Sales' report. At the top, there are navigation buttons and a message about relative dates. Below that, the report title 'MTD Dealer Sales' and 'As of Date: 2025-10-05' are displayed. The main content is a table titled 'Sales by City'. The table has columns for City, Dealer Name, Postal Code, Contact Name, Contact Phone Number, MTD [Quantity Sold], and MTD [Profit]. The data is grouped by city, with summary rows for Arvada, Aurora, Colorado Springs, Denver, Federal Heights, and Littleton. A green arrow points to the first row of the table.

Sales by City						
City	Dealer Name	Postal Code	Contact Name	Contact Phone Number	MTD [Quantity Sold]	MTD [Profit]
Arvada	Weston Auto	80002	Rebecca Kaplan	1 (303) 555-1354	108	141,093
Aurora	North Parker Auto	80014	Wayne Anderson	1 (303) 555-3432	96	125,381
	South Parker Auto	80016	Terry Swift	1 (303) 555-5441	91	119,781
Colorado Springs		Narezney's Auto		Abdul Syed	1 (719) 555-4559	87
						115,455
Denver	Colfax Auto	80204	Louis Feldcamp	1 (303) 555-9383	89	118,497
	Great Outdoors Auto	80238	Robert Young	1 (303) 555-3333	111	145,684
	Northern Auto Sales	80211	Janet Duggan	1 (303) 555-6548	117	155,246
Federal Heights		Club Auto Sales		David Latella	1 (303) 555-2993	100
						131,899
Littleton	Broadway Auto	80120	Gary Syrett	1 (303) 555-6889	75	100,609
						100,609

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25. Open the Assistant UI and ensure “Agentic AI Preview” check box is ON

The screenshot shows the IBM Cognos Analytics interface with the report titled "Auto group MTD dealer sales". A green arrow labeled "1" points to the top right corner where the "Agentic AI Preview" checkbox is checked. Another green arrow labeled "2" points to the bottom right corner where the "Ask a question" button is located.

This sample demonstrates relative dates in the context of a report. You will see examples of how to use MTD measures in Lists, pModel (Select a Model tab), pDate (Yesterday's Sales tab), and pRecall.

More information: Relative date analysis, Sample calendars, Default parameter values

**MTD Dealer Sales** As of Date: 2025-10-05

**Sales by City**

City	Dealer Name	Postal Code	Contact Name	Contact Phone Number	MTD [Quantity Sold]	MTD [Revenue]
Arvada	Weston Auto	80002	Rebecca Kaplan	1 (303) 555-1354	108	\$10,800
					Arvada	108
Aurora	North Parker Auto	80014	Wayne Anderson	1 (303) 555-3432	96	\$9,600
	South Parker Auto	80016	Terry Swift	1 (303) 555-5441	91	\$9,100
					Aurora	187
Colorado Springs	Narezney's Auto	80219	Abdul Syed	1 (719) 555-4559	87	\$8,700
					Colorado Springs	87
Denver	Colfax Auto	80204	Louis Feldcamp	1 (303) 555-9383	89	\$8,900
	Great Outdoors Auto	80238	Robert Young	1 (303) 555-3333	111	\$11,100
	Northern Auto Sales	80211	Janet Duggan	1 (303) 555-6548	117	\$11,700
					Denver	317
Federal Heights	Club Auto Sales	80221	David Latella	1 (303) 555-2993	100	\$10,000
					Federal Heights	100
Littleton	Broadway Auto	80120	Gary Syrett	1 (303) 555-6889	75	\$7,500
					Littleton	75
Westminster	Suwanda's Auto	80234	Vinay Acharya	1 (303) 555-1188	74	\$7,400
					Westminster	74

26. In the chat, type **Summarize this report**

The screenshot shows the Agentic AI Preview interface. A green arrow labeled "1" points to the "Summarize this report" input field at the bottom. Another green arrow labeled "2" points to the "Ask a question" button on the right.

@Agentic AI ⓘ

Welcome to the preview of agentic AI in Cognos Analytics. I can help you with finding reports, summarizing an open report, sharing reports as well as creating tabular reports.

Summarize this report

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27. You should see the summary of the Sales report as shown below

The screenshot shows a Cognos Analytics interface with a report titled "MTD Dealer Sales" as of October 5, 2025. The report displays sales data by city, including Arvada, Aurora, Colorado Springs, Denver, Federal Heights, Littleton, and Westminster. The data is presented in a table with columns for City, Dealer Name, Postal Code, Contact Name, Contact Phone Number, MTD [Quantity Sold], and MTI. The total sales for the month are 948 units with a profit of \$1,251,217. The Hudson model is the best-selling model with 317 units sold. The report also includes an "Assistant" panel with key findings, trends, and a summary of MTD Dealer Sales Report.

City	Dealer Name	Postal Code	Contact Name	Contact Phone Number	MTD [Quantity Sold]	MTI
Arvada	Weston Auto	80002	Rebecca Kaplan	1 (303) 555-1354	108	
					Arvada	108
Aurora	North Parker Auto	80014	Wayne Anderson	1 (303) 555-3432	96	
	South Parker Auto	80016	Terry Swift	1 (303) 555-5441	91	
					Aurora	187
Colorado Springs	Narezney's Auto	80219	Abdul Syed	1 (719) 555-4559	87	
					Colorado Springs	87
Denver	Colfax Auto	80204	Louis Feldcamp	1 (303) 555-9383	89	
	Great Outdoors Auto	80238	Robert Young	1 (303) 555-3333	111	
	Northern Auto Sales	80211	Janet Duggan	1 (303) 555-6548	117	
					Denver	317
Federal Heights	Club Auto Sales	80221	David Latella	1 (303) 555-2993	100	
					Federal Heights	100
Littleton	Broadway Auto	80120	Gary Syrett	1 (303) 555-6689	75	
					Littleton	75
Westminster	Suwanda's Auto	80234	Vinay Acharya	1 (303) 555-1188	74	
					Westminster	74
					Overall	948

**Key Findings:**

- Total Sales: The overall sales quantity for the month-to-date period is 948 units, with a total profit of \$1,251,217.
- Top-Performing Cities: Denver is the top-performing city, with a total sales quantity of 317 units and a profit of \$419,427. Aurora and Colorado Springs follow, with sales quantities of 187 and 87 units, respectively.
- Top-Performing Dealerships: Northern Auto Sales is the top-performing dealership, with a sales quantity of 117 units and a profit of \$155,246. Weston Auto and Great Outdoors Auto follow, with sales quantities of 108 and 111 units, respectively.
- Model Sales: The Hudson model is the best-selling model, with a total sales quantity of 332 units and a profit of \$166,520.
- Daily Sales: The report also provides daily sales data, with a total of 98 sales on October 4, 2025.

**Trends:**

- Sales Distribution: Sales are concentrated in a few cities, with Denver accounting for over 30% of total sales.
- Model Popularity: The Hudson model is the most popular, accounting for over 35% of total sales.
- Dealer Performance: Northern Auto Sales and Weston Auto are the top-performing dealerships, with sales quantities exceeding 100 units.

Ask a question →

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## 3.3 Let's then share my findings

28. In the chat, type **Share this report**

29. When prompted with “Would you like to share via Slack or email?”,

- o Type **I would like to email it to me@gmail.com**
- o Replace the address with your own email if you want to receive the file personally.
- o Skip the Slack option since it is not configured in this environment.

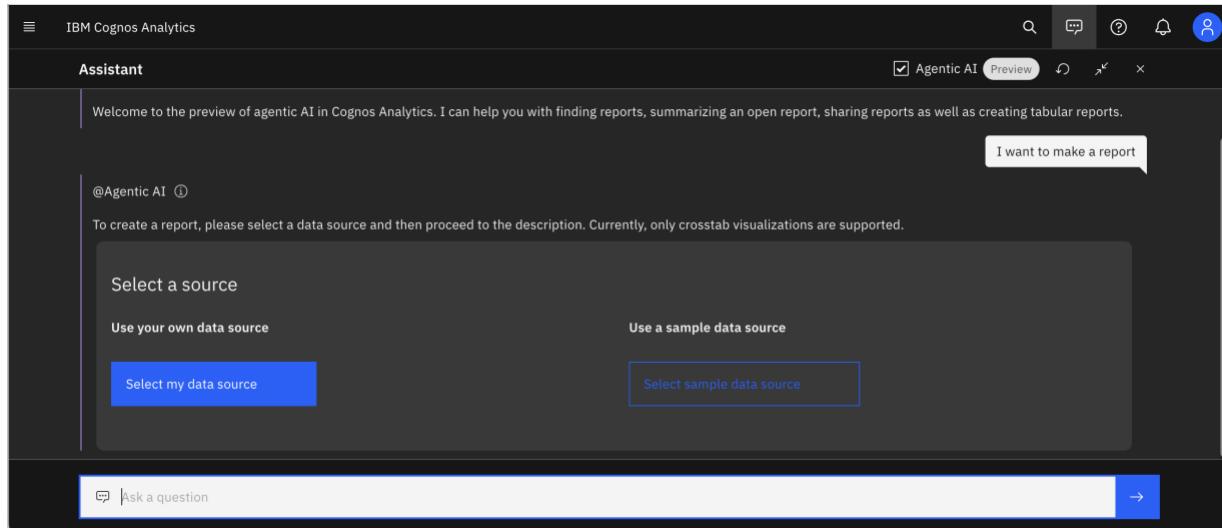
The screenshot shows the IBM Cognos Analytics interface with an open report titled "Auto group MTD dealer sales". The report displays "Yesterday's Sales" data for "MTD Dealer Sales" as of "2025-10-02". A sidebar on the right is titled "Assistant" and contains a message from "@Agentic AI" asking if the user wants to share the report via Email or Slack. The user has responded with "email to me@gmail.com and say 'I love this report from Cognos Analytics'". A green arrow labeled "1" points to the "share this report" button in the message bubble. Another green arrow labeled "2" points to the response message.

## 3.4 If at any time you want to start new conversation session with an Agent, click this button

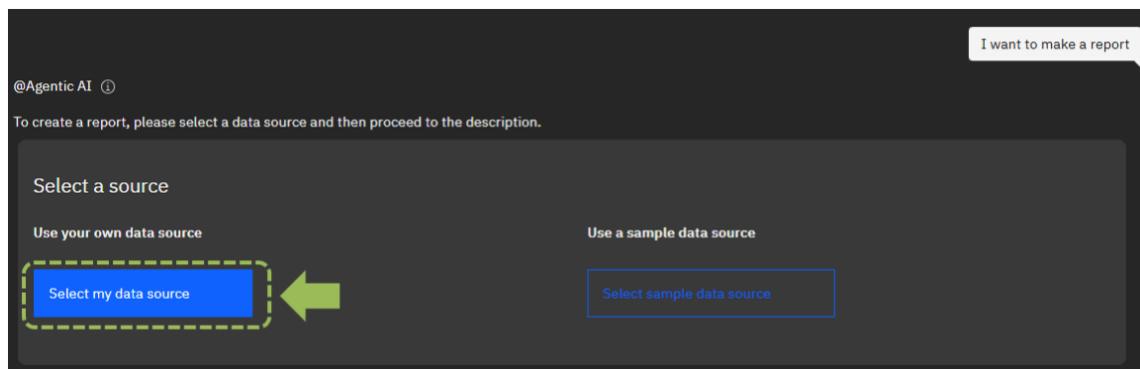
The screenshot shows the IBM Cognos Analytics interface with an open report. The "Assistant" sidebar displays a welcome message from "@Agentic AI" and a button labeled "Clear chat and reset to default source". A green arrow points to the circular "New Conversation" button located in the top right corner of the sidebar area.

## 3.5 Create a report using Agent

30. Say I want to make a report

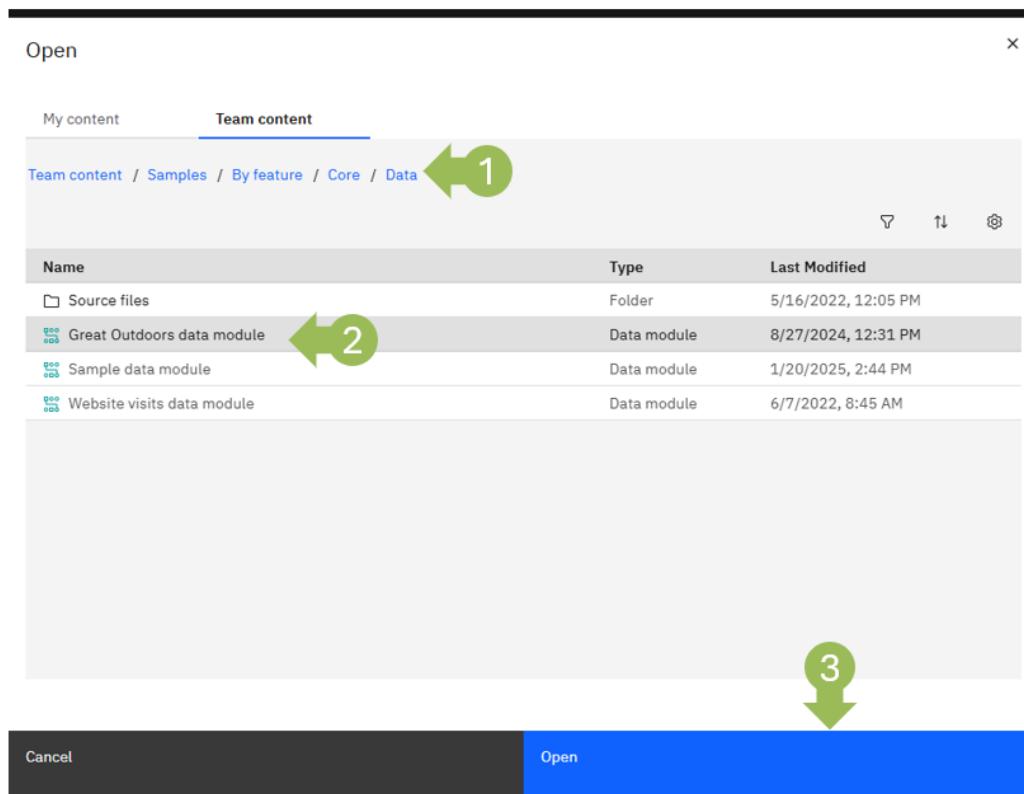


31. Click the **Select my data source** button to open the data selection panel.

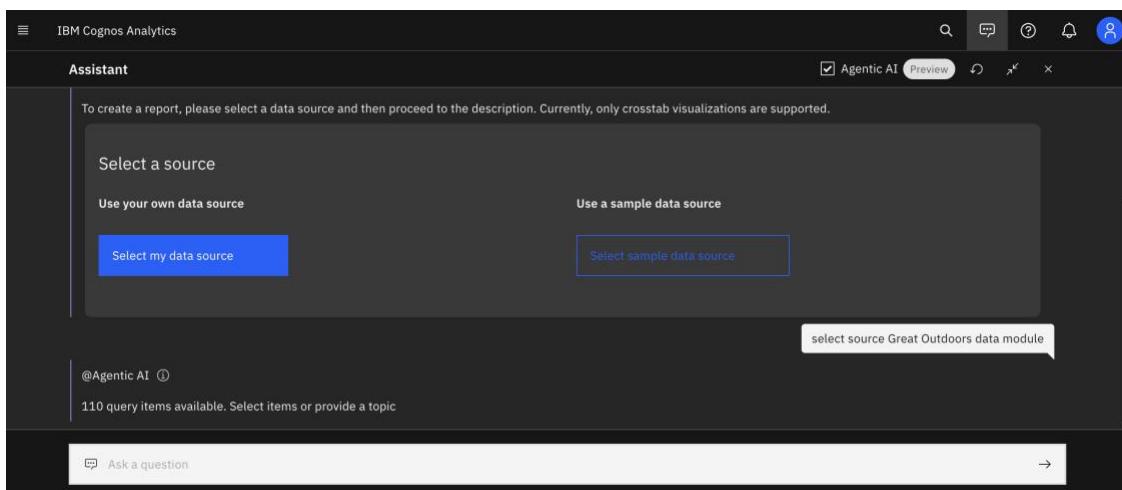


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32. Navigate through the folders: Samples → By Feature → Core → Data. Then Select the Great Outdoors data module and click Open



33. Once the source is selected, you should see a confirmation message below the input area



# IBM TechXchange

34. You now have an opportunity to specify what business insight you would like to get from new report.

Say **I want to analyze revenue by country and product line**. Then After you are presented with the list of items, which are attributes and measures that can be used to analyze data based on your topic.

The screenshot shows the IBM Cognos Analytics interface with the 'Assistant' tab selected. A sidebar on the left lists categories: '@Agentic AI', 'Introduction to Suggested Items', 'Revenue', 'Country', and 'Product Line'. Under 'Revenue', there is a bulleted list: 'Planned revenue', 'Revenue', 'Gross profit', 'Product cost', and 'Gross Margin'. Under 'Country', there is a bulleted list: 'Retailer country' and 'Retailer province or state'. Under 'Product Line', there is a bulleted list: 'Product line'. At the top right, there are several icons: a magnifying glass, a speech bubble, a question mark, a bell, and a user profile. A checkmark next to 'Agentic AI' is followed by a 'Preview' button. Below the preview button are refresh and close symbols.

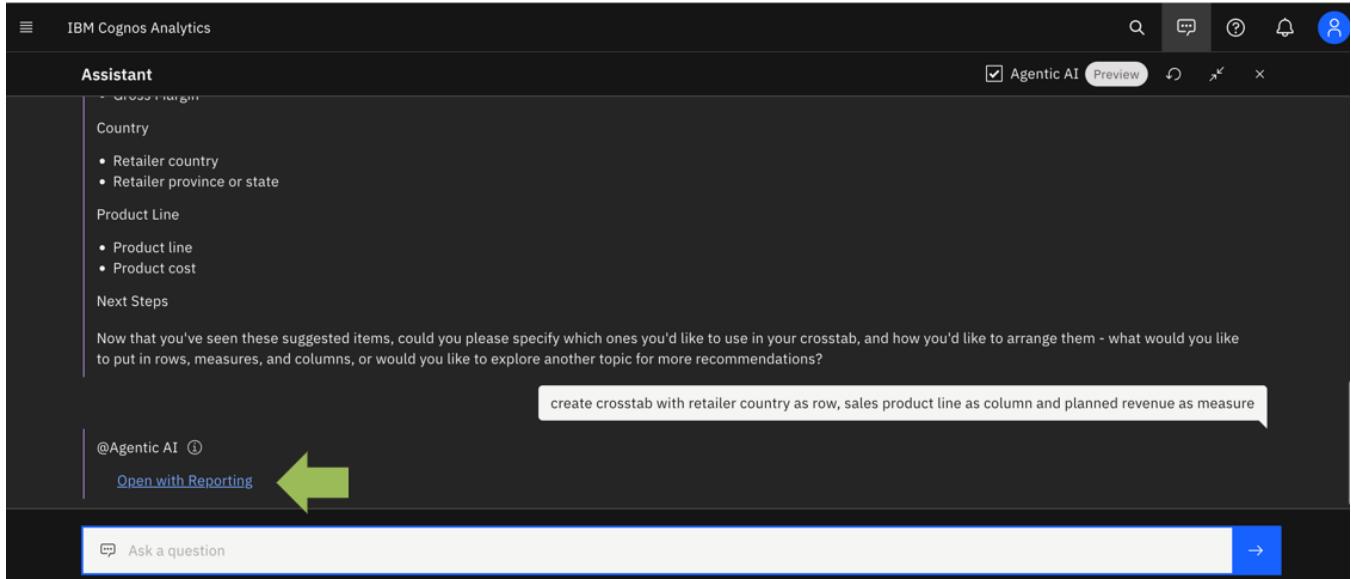
35. Use these items to specify measure and attributes for rows and columns.

Say: **Create crosstab with retailer country as row, sales product line as column and planned revenue as measure** to build your crosstab

The screenshot shows the IBM Cognos Analytics interface with the 'Assistant' tab selected. A sidebar on the left lists categories: 'Country', 'Product Line', and 'Next Steps'. Under 'Country', there is a bulleted list: 'Retailer country' and 'Retailer province or state'. Under 'Product Line', there is a bulleted list: 'Product line' and 'Product cost'. Under 'Next Steps', there is a message: 'Now that you've seen these suggested items, could you please specify which ones you'd like to use in your crosstab, and how you'd like to arrange them - what would you like to put in rows, measures, and columns, or would you like to explore another topic for more recommendations?'. A text input field contains the command: 'create crosstab with retailer country as row, sales product line as column and planned revenue as measure'. At the bottom left, there is a link 'Open with Reporting'. At the bottom right, there is a blue bar with a white 'Ask a question' button and a blue arrow icon.

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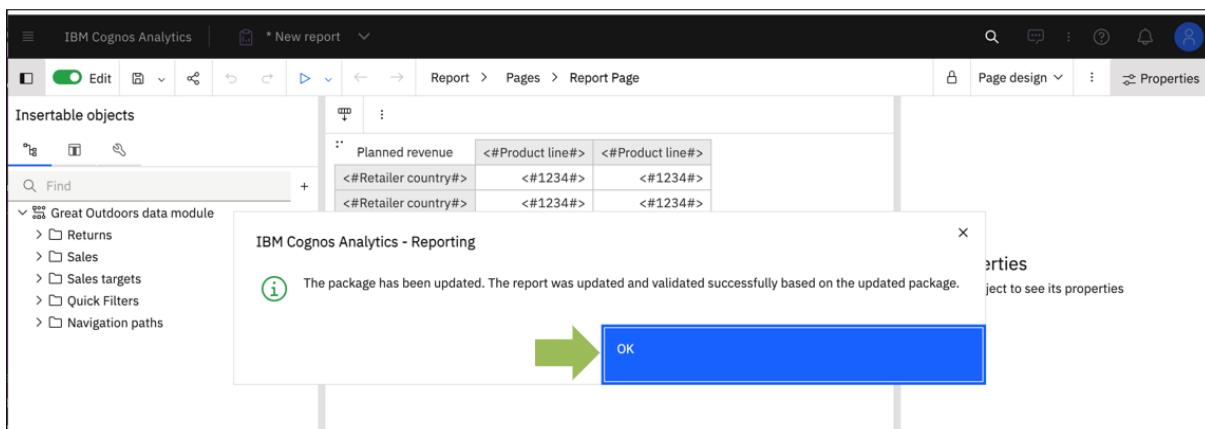
36. Once the process is complete, you will be provided with a link to open the created. Click the link **Open with Reporting**



The screenshot shows the IBM Cognos Analytics Assistant interface. On the left, there's a sidebar with sections for 'Country' (Retailer country, Retailer province or state), 'Product Line' (Product line, Product cost), and 'Next Steps'. Below these is a message: 'Now that you've seen these suggested items, could you please specify which ones you'd like to use in your crosstab, and how you'd like to arrange them - what would you like to put in rows, measures, and columns, or would you like to explore another topic for more recommendations?'. At the bottom left, there's a button labeled '@Agentic AI' with a question mark icon, followed by 'Open with Reporting' and a green arrow pointing to it. At the very bottom is a search bar with 'Ask a question' and a blue 'Ask' button.

37. The report opens in Edit mode in the Reporting interface.

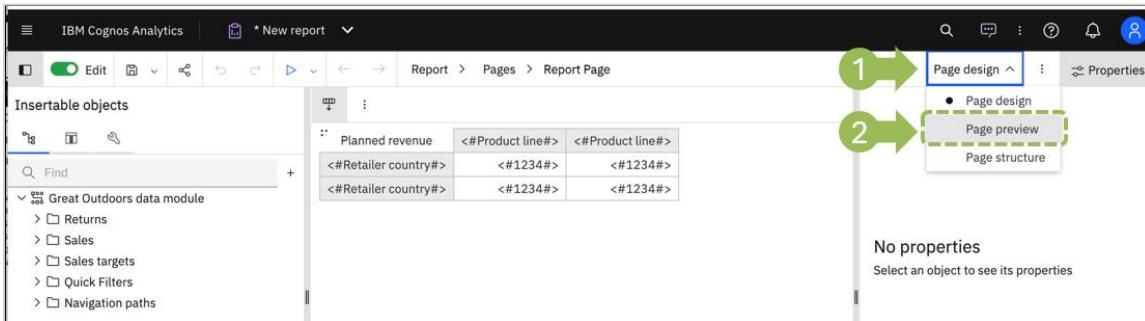
- You'll see a confirmation message letting you know that the report was created successfully.
- Click OK to move forward.



The screenshot shows the IBM Cognos Analytics Reporting interface. In the center, a modal dialog box is open with the title 'IBM Cognos Analytics - Reporting'. It contains the message: 'The package has been updated. The report was updated and validated successfully based on the updated package.' At the bottom right of the dialog is a blue 'OK' button with a green arrow pointing to it. The background shows the reporting interface with various tools and a sidebar.

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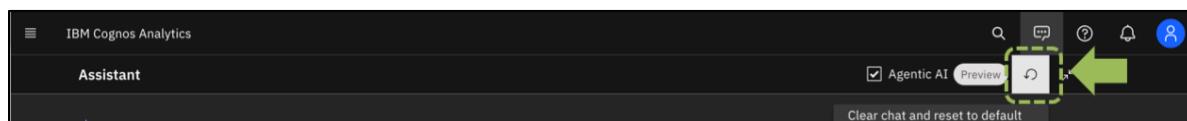
38. From the toolbar, open the **Page Design** dropdown and select **Page Preview** in the top-right corner. This option allows you to run the report in preview mode and check how the layout and data appear before finalizing it.



39. After the report executes, the preview window displays your new report fully populated with data from the **Great Outdoors** data module

Planned revenue	Camping Equipment	Personal Accessories	Outdoor Protection	Golf Equipment	Mountaineering Equipment
France	99,543,042.65	127,355,904.60	5,317,827.67	44,431,426.21	23,518,113.04
United States	282,444,485.28	370,717,212.17	13,604,250.84	130,092,124.52	69,134,491.93
Finland	75,468,125.07	65,399,774.48	3,473,648.32	35,694,775.07	18,913,941.37
Austria	42,632,528.03	72,487,340.84	1,968,511.36	20,771,776.89	11,689,199.82
Netherlands	70,402,126.38	70,171,134.81	3,111,019.19	32,962,338.46	17,270,521.59
Japan	125,022,123.12	154,930,447.16	6,039,957.77	58,445,971.88	29,999,385.69
Germany	96,218,271.99	107,586,636.66	5,080,346.86	43,421,664.83	23,169,098.54
Korea	86,101,856.15	60,496,739.19	4,329,969.60	40,905,592.37	21,105,431.39
Spain	62,168,857.43	61,439,395.83	2,802,984.27	30,069,294.32	17,156,004.25
Italy	68,248,070.52	73,209,828.36	3,030,536.72	33,374,411.16	18,319,015.84
Sweden	26,466,429.85	44,370,392.32	1,004,529.09	18,824,307.73	8,957,576.34
Denmark	21,612,008.13	34,004,239.13	1,188,085.49	4,412,391.68	3,309,396.26
Australia	44,778,902.22	34,035,856.15	1,190,617.09	20,675,741.42	14,630,689.21
Canada	110,856,149.88	125,365,583.79	5,213,348.30	50,022,907.98	28,195,069.83
Belgium	39,655,929.18	47,631,130.16	1,675,169.29	17,957,316.93	11,276,154.74
Switzerland	31,716,904.19	47,199,995.04	965,272.53	14,583,345.41	10,425,158.97
Mexico	74,088,299.51	45,796,785.93	3,190,063.89	34,076,591.38	20,194,942.33
United Kingdom	101,158,389.11	113,942,065.11	5,340,332.10	46,791,828.34	24,065,800.33
China	118,198,740.60	125,481,837.67	5,718,755.81	55,996,895.05	28,685,748.62
Singapore	78,346,675.51	72,989,797.29	3,556,115.36	34,915,938.07	18,652,201.57

## 3.6 Start new conversation session with an Agent by clicking this button



# IBM TechXchange

## 3.7 And, finally let's find a report

40. let's ask the Assistant to locate a report that compares actual and projected performance.

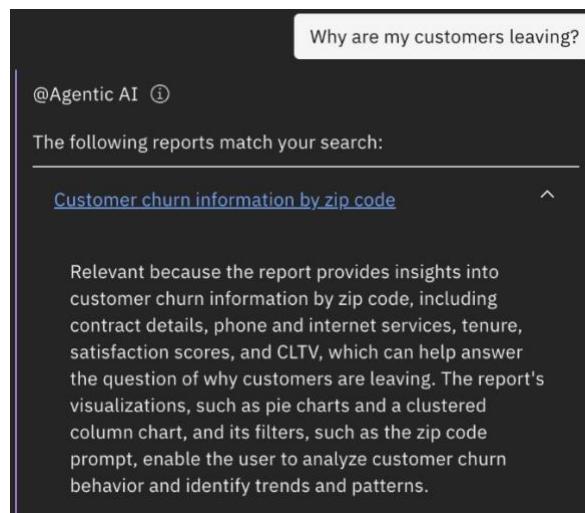
Type or say: **How is my revenue trending compared to projections?**

- The Agent will return a list of the most relevant reports related to your question.
- You can expand each result to view notes describing why it was considered relevant based on your query. These notes help you understand how the Assistant interprets your request and prioritizes matching reports.
- This makes it easier to identify the most accurate report and quickly access the one that best fits your analysis needs.

The screenshot shows a dark-themed AI search interface. At the top, a message bubble contains the query: "How is my revenue trending compared to projections?". Below it, the text "@Agentic AI ⓘ" is displayed. A section titled "The following reports match your search:" lists several items, each with a title and a descriptive note below it. The first item, "Q3 revenue", is highlighted with a blue border. Its description reads: "Relevant because the report contains data on 'Planned Revenue' and 'Revenue' which can be used to compare revenue trends and projections. The report also includes a filter on 'Quarter' which allows for analysis of revenue trends over time, such as 'Q3 2024'." Below this are other items: "Q2 revenue", "Q1 revenue", "Q4 revenue", and "Income statement", each with a small downward arrow icon to its right.

41. To wrap up, try another question to find relevant reports that explain customer behavior. Say **Why are my customers leaving?**

- The Agent will analyze your question and search for reports that best address it. It uses semantic similarity, which means it compares the meaning of your question to report titles, descriptions, and metadata.
- This allows the Assistant to surface reports that are conceptually aligned with your query, even if the phrasing is different.
- Once the results appear, you'll see a list of the most relevant reports. You can expand each result to read notes describing how it relates to your question



## 4 watsonx BI Integration with Cognos Analytics

IBM watsonx BI is a conversational data analysis tool that allow users to monitor personalized business metrics, ask questions against their data and metrics as well as create visualizations in natural language. Users can connect to enterprise data sources, create semantic data models, define and publish metrics for their organizations to enable live monitoring of metrics and ad hoc analysis.

In this section, the main objective is to demonstrate how a **Cognos Analytics Framework Manager (FM) package** can be used as a data source for **watsonx BI**. The advantage of this approach is that Cognos users can preserve and leverage all the modeling work already done in FM packages while enjoying the generative AI experience of watsonx BI. By connecting FM packages to watsonx BI, organizations ensure consistency while enabling users to take advantage of AI-driven exploration and automated insight generation without having to rebuild existing models.

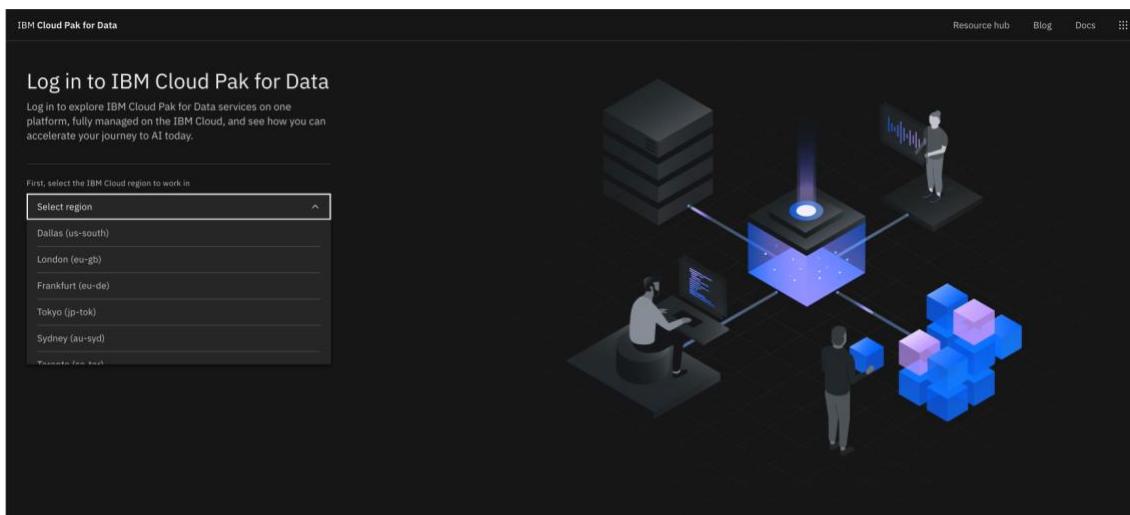
### 4.1 Login to the IBM watsonx BI

Participants will use a browser to access the lab environment. Launch IBM watsonx BI and login using the provided credentials.

IBM watsonx BI url:

<https://dataplatform.cloud.ibm.com/wxbi>

Select region: Dallas (us-south)

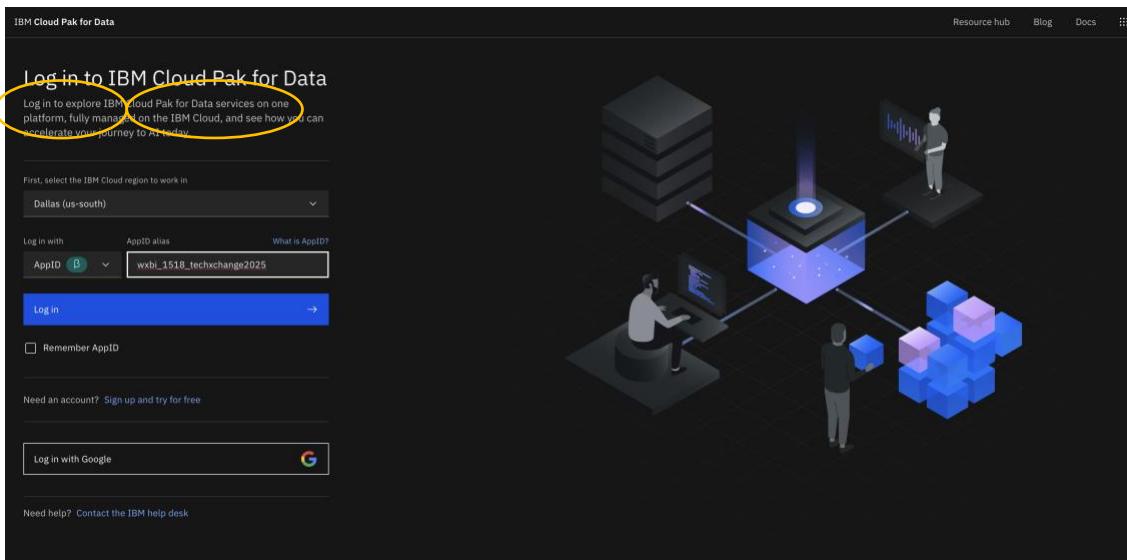


# IBM TechXchange

Log in with AppID

AppID alias: wxbi\_1518\_techxchange2025

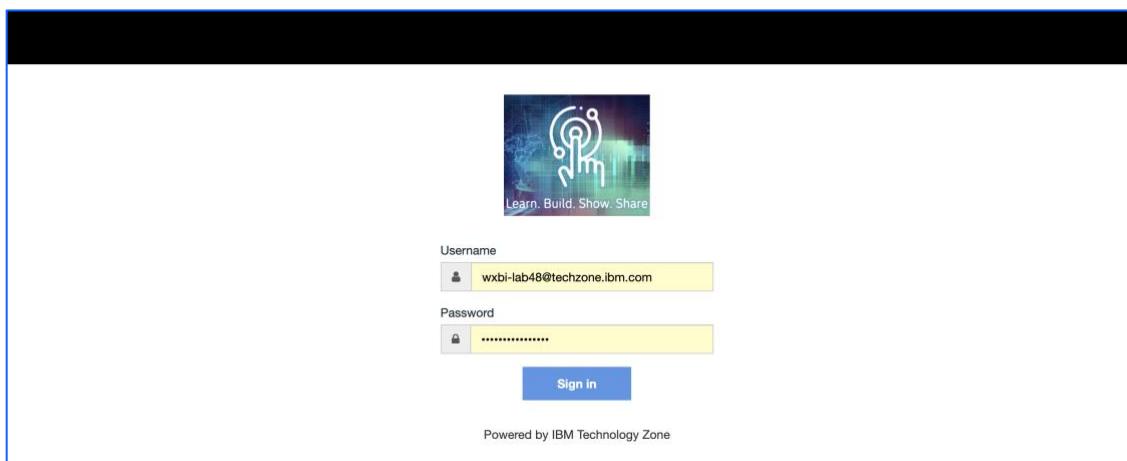
Please make sure you enter the exact app ID in the above for the purpose of this lab. This portion is only required for the purpose of authenticating the assigned user ids for this lab. Otherwise, normally you can enter your IBM Cloud id.



Login using the provided username and password.

Username: wxbi-labxx@techzone.ibm.com

Password: xxxxxxxxx

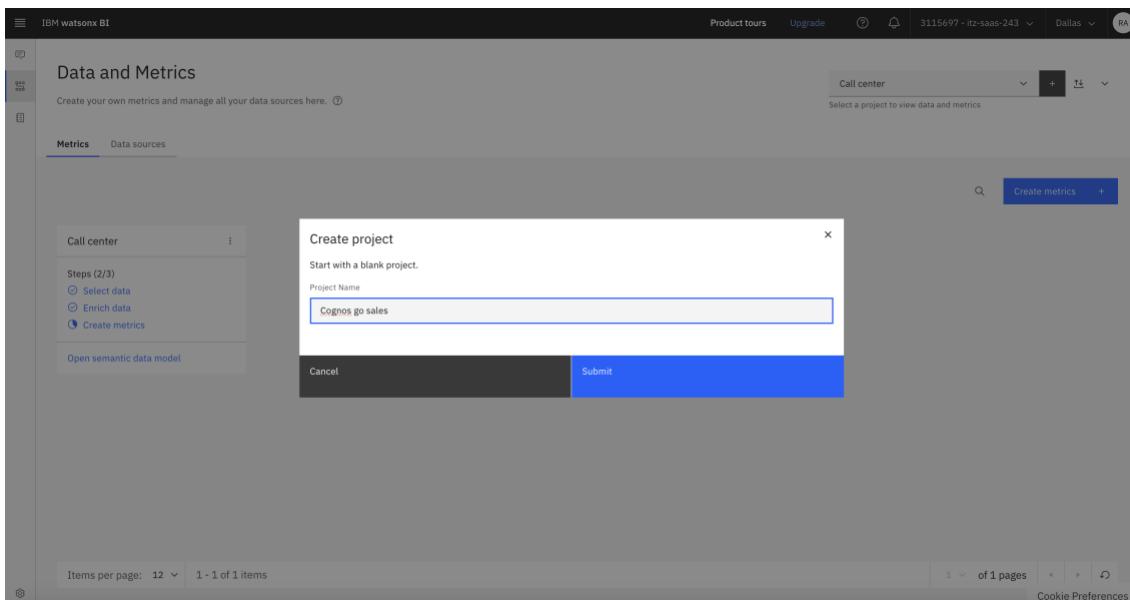




## 4.2 Cognos FM package metric creation

In this portion of the lab, participants will import a Cognos FM package into IBM Watson BI, create metrics that will allow them to ask business question against the data that is modelled in Cognos.

1. Click “IBM Watson BI” at the top right of your screen, then select “Data and Metrics” in the left-hand menu. Create a new project that will be used to import the Cognos semantic model. In the Data and Metrics page, Click the “+” beside the project list on the top right page and create a new project call “Cognos go sales”



2. After creating the project, switch to the project list view by opening the navigation panel and select “View all Projects”

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The screenshot shows the IBM Watson BI interface. On the left, a navigation sidebar is open, with the 'Projects' section highlighted by a yellow circle. The main area displays a message: 'No metrics' with a note: 'To start, click **Create metrics**. We'll first create a semantic data model for you. This is where you can then add your data and create metrics.' Below this is a 'Create metrics' button. At the top right, there are tabs for 'Cognos go sales' and 'Create metrics'. The bottom of the screen shows the URL 'https://dataplatform.cloud.ibm.com/projects?context=wwbi'.

3. In the project list, click on the new project that you have just created

The screenshot shows the 'Projects' list in the IBM Watson BI interface. A yellow circle highlights the 'Cognos go sales' project in the list. The table columns are: Name, Date created, Your role, Collaborators, and Tags. The 'Cognos go sales' project was created '5 minutes ago' by an 'Admin' user, with a collaborator icon 'WX'.

Name	Date created	Your role	Collaborators	Tags
My project	Now	Admin	WX	
Cognos go sales	5 minutes ago	Admin	WX	
Call center ready	5 hours ago	Admin	WX	

4. In the project, click the “Assets” tab and click “New Asset”.

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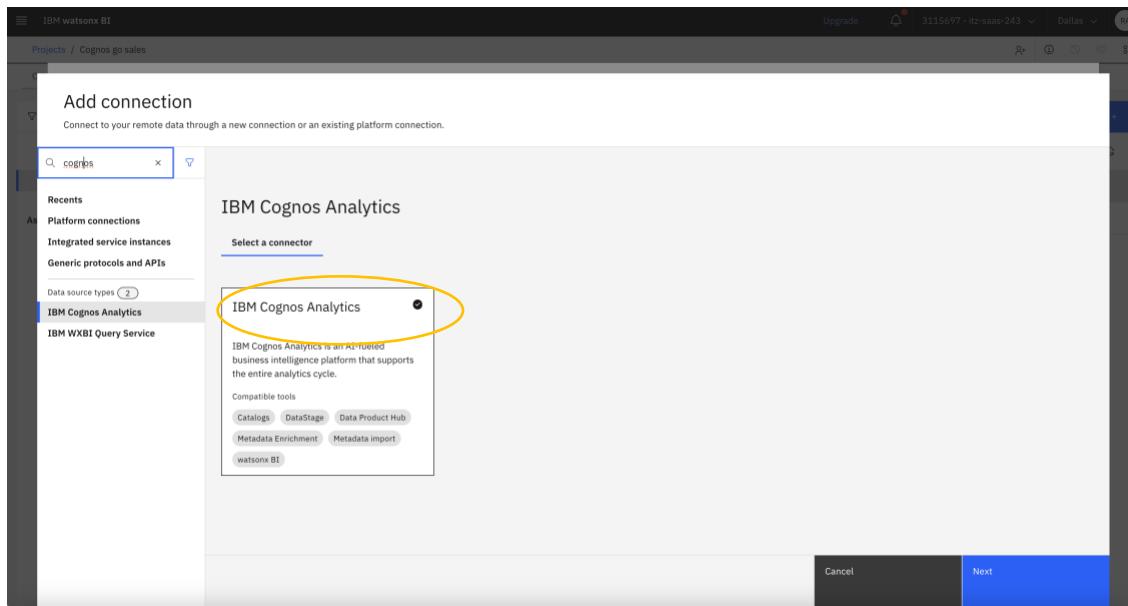
The screenshot shows the IBM Watson BI interface. At the top, there is a navigation bar with links for Upgrade, Projects, Cognos go sales, Overview, Assets (which is highlighted with a yellow circle), Jobs, and Manage. Below the navigation bar is a search bar labeled "Find assets". On the left, there is a sidebar titled "Asset types" with categories like "All assets" (selected) and "Data access". The main area is titled "All assets" and shows a table with one item: "IBM WXBI Query Service Connection". A blue button labeled "New asset" is located in the top right corner of the main content area, also circled in yellow.

Select “Connect to a data source” to create a new Connection to the Cognos server.

The screenshot shows the "Prepare data" section of the IBM Watson BI interface. It includes a search bar and four options: "Import metadata for data assets", "Enrich data assets with metadata", "Define reusable sets of parameters", and "Connect to a data source" (which is highlighted with a yellow circle). Below these are sections for "SQL" (with "Create a dynamic view of data") and "Analyze data".

5. Search for Cognos, and click on IBM Cognos Analytics to create a new connection that connects to Cognos

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6. In the new connection dialog, enter the following information and test the connection and make sure it is successful. Click Create.

**Name:** Cognos data connection

**Gateway URL:** <https://wxbia.analytics-devlab-nonprod.w3cloud.ibm.com:443/bi/v1/disp>

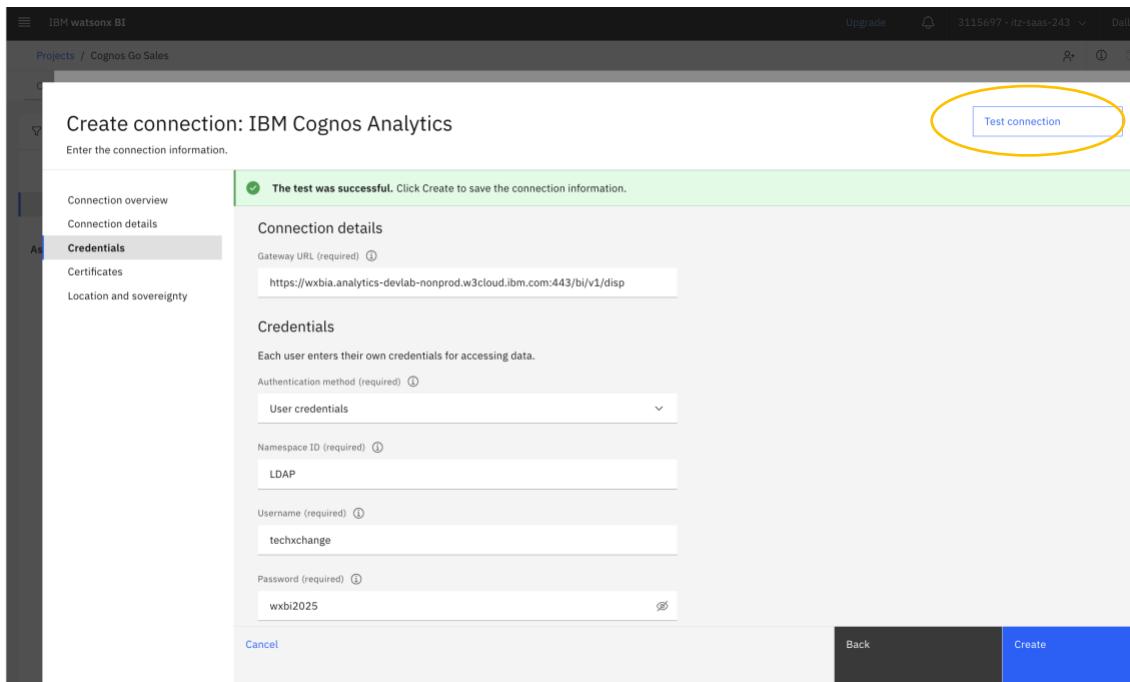
**Authentication:** User credentials

**Namespace ID:** LDAP

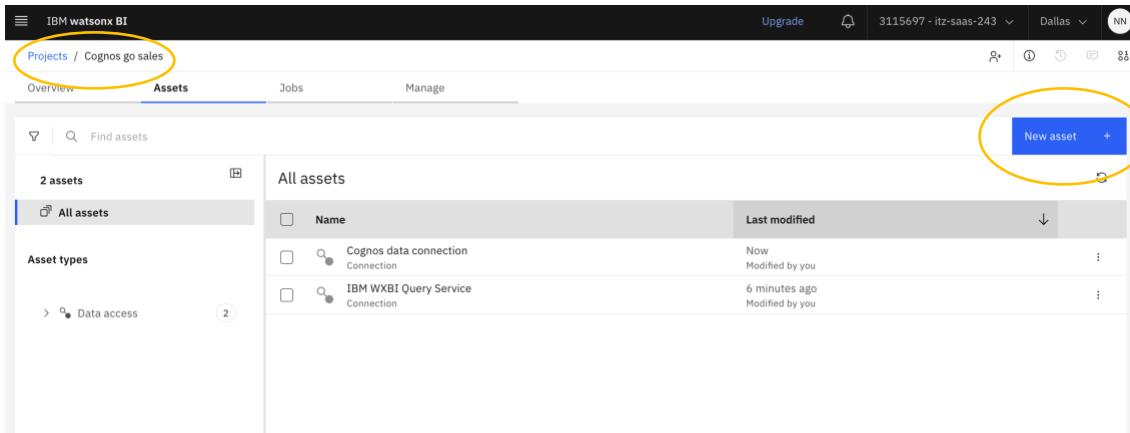
**Username:** techxchange

**Password:** wxbi2025

# IBM TechXchange

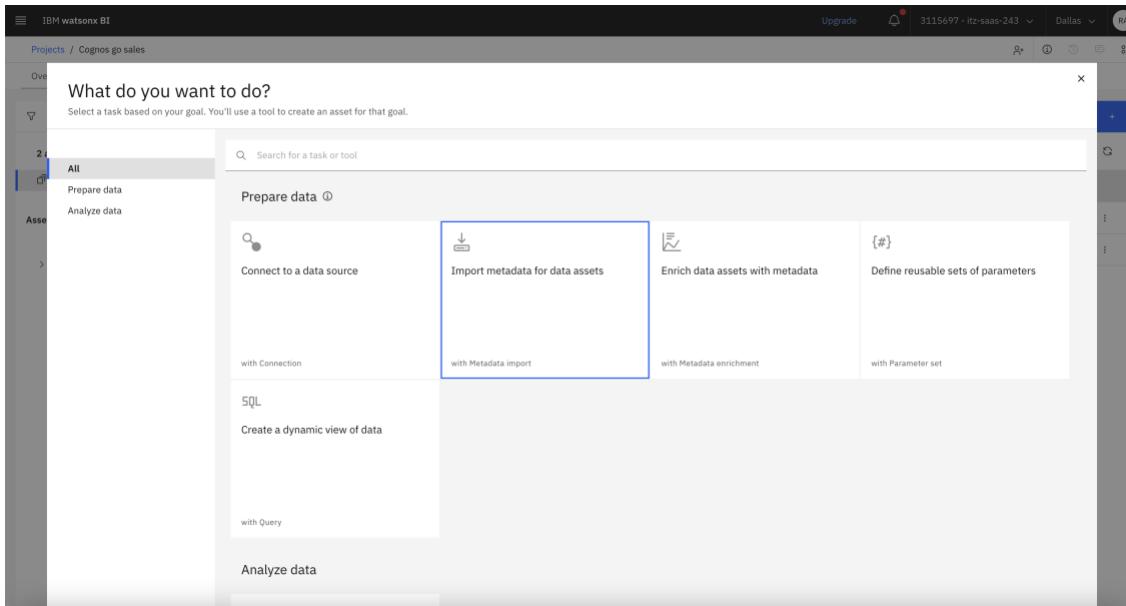


7. You are back to the project page, "Cognos go sales". Click the "Assets" tab and click "New Asset".

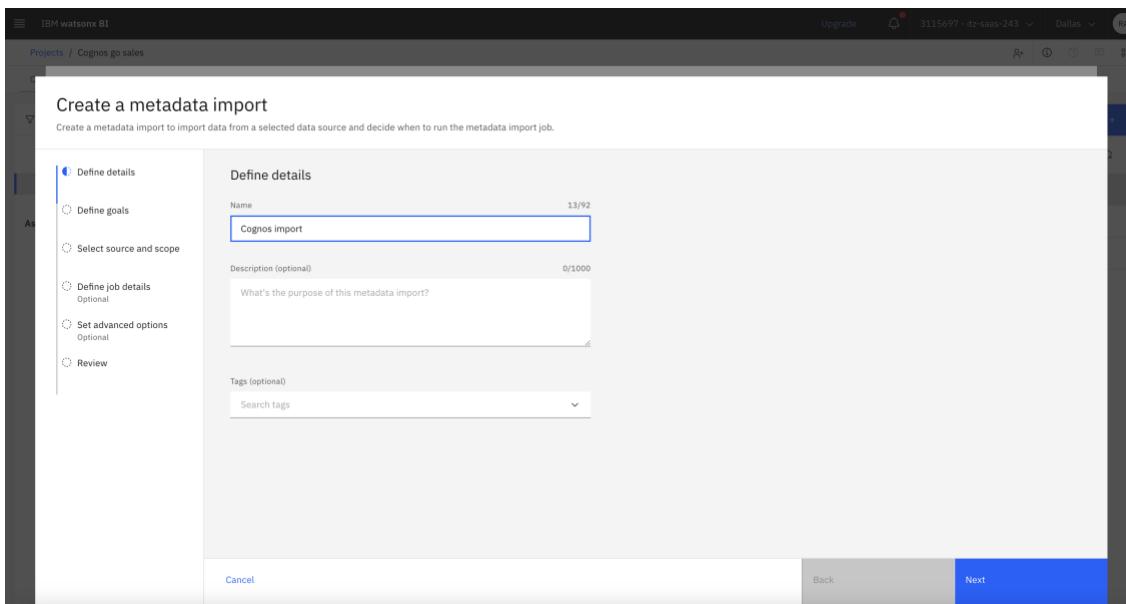


8. Select "Import metadata for data assets" to import Cognos metadata.

# IBM TechXchange

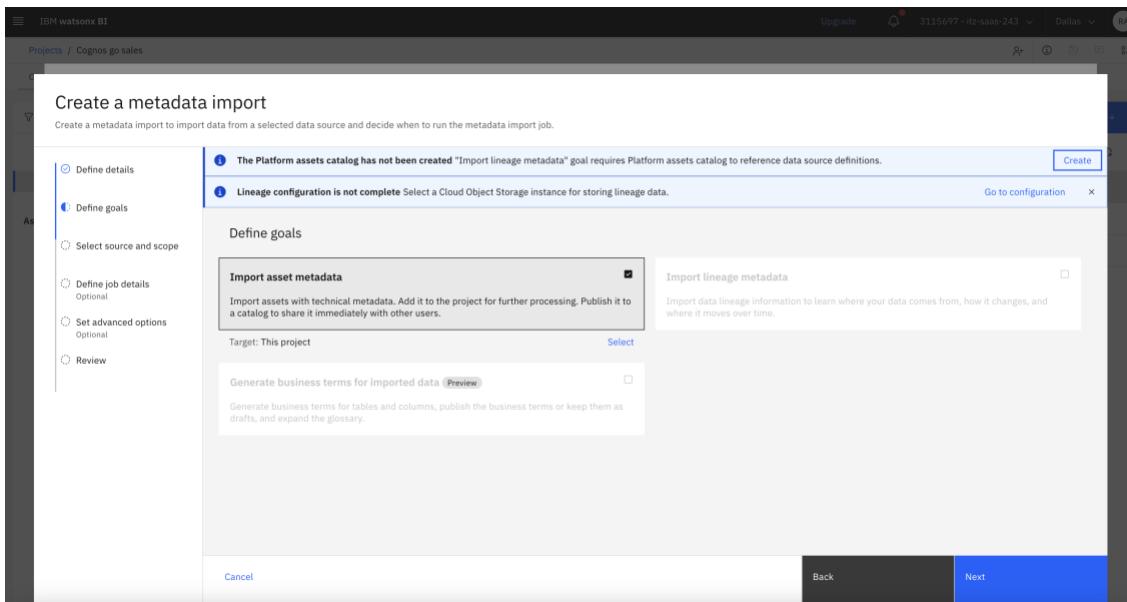


9. Call it Cognos import. Click Next.

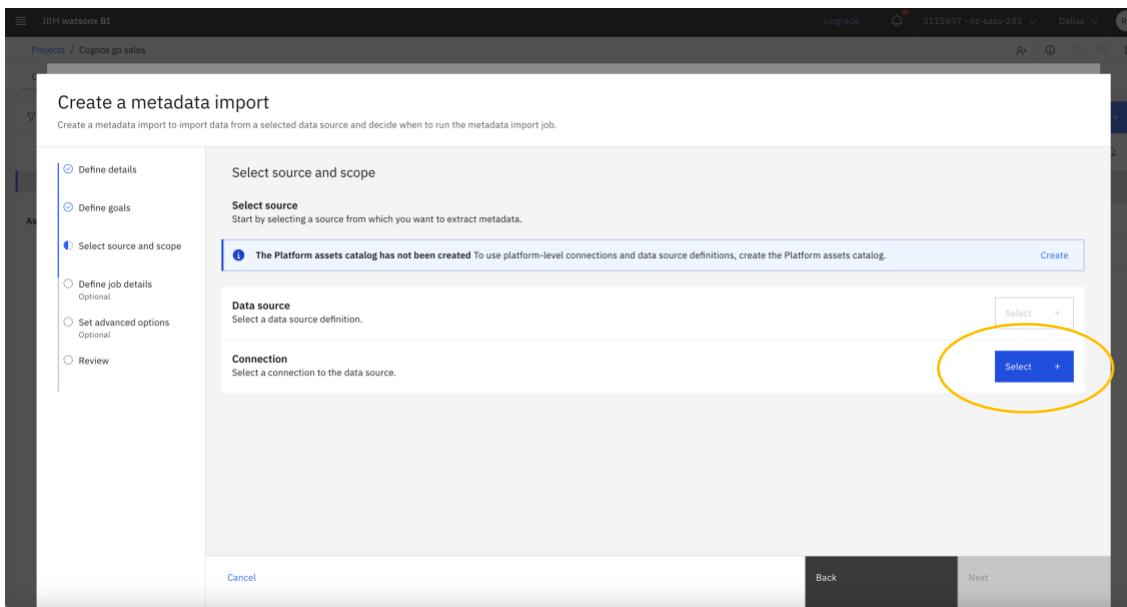


10. Select "Import asset metadata" and click Next. Ignore the informational bars in blue.

# IBM TechXchange

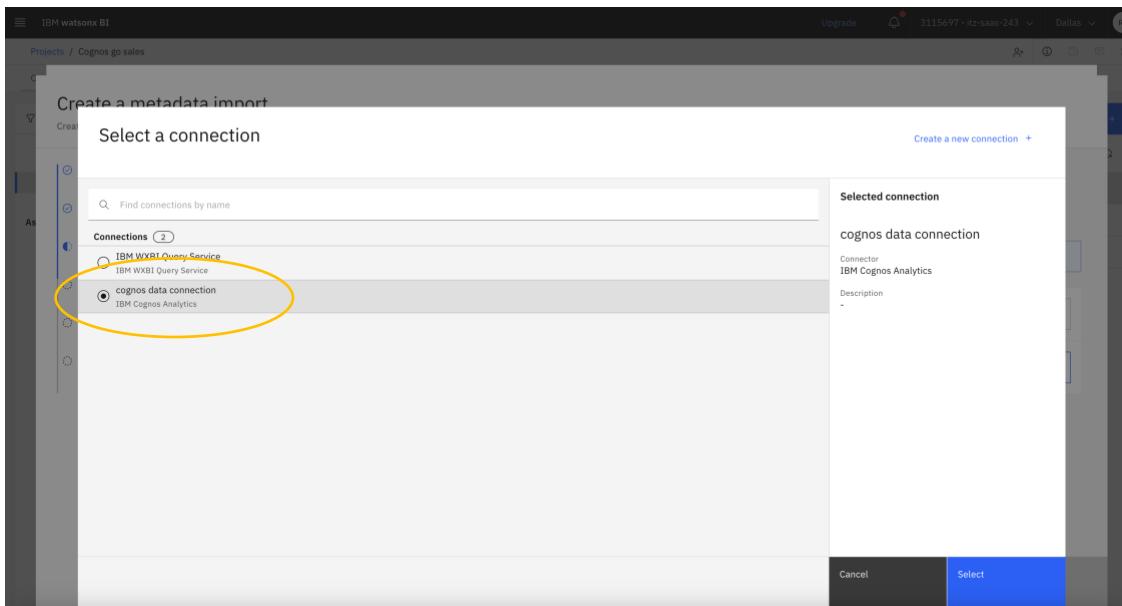


11. Click “Select” on “Connection” to select a connection to the data source.

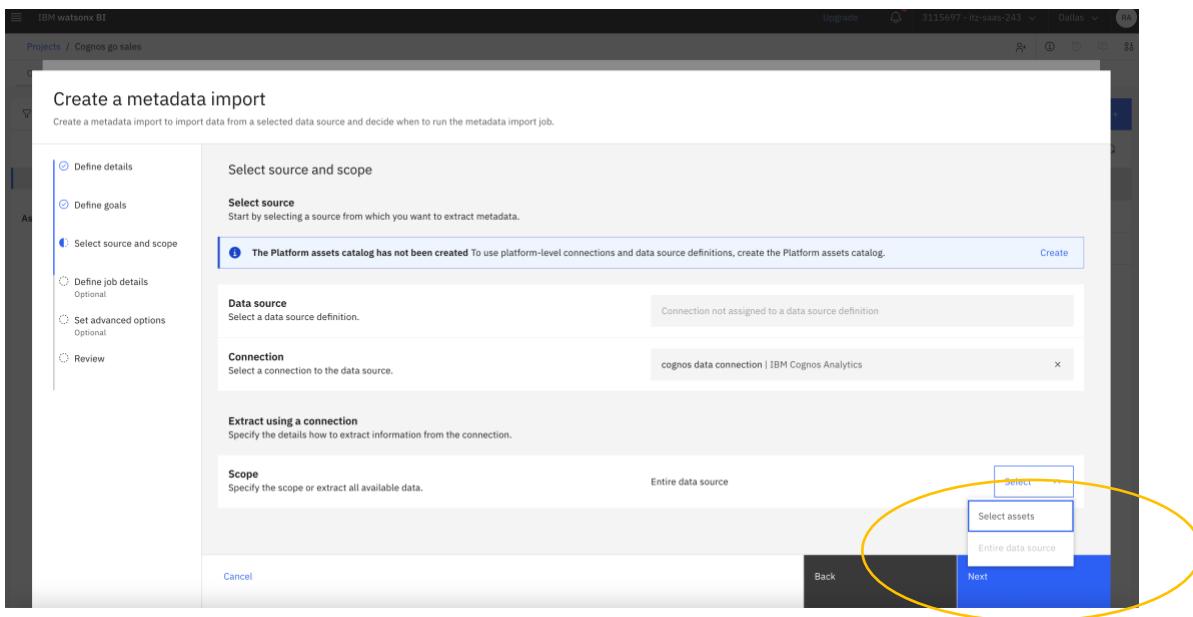


12. Select the new Cognos data connection that you previously created.

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13. Click “Select” on “Scope” to select the assets scope.

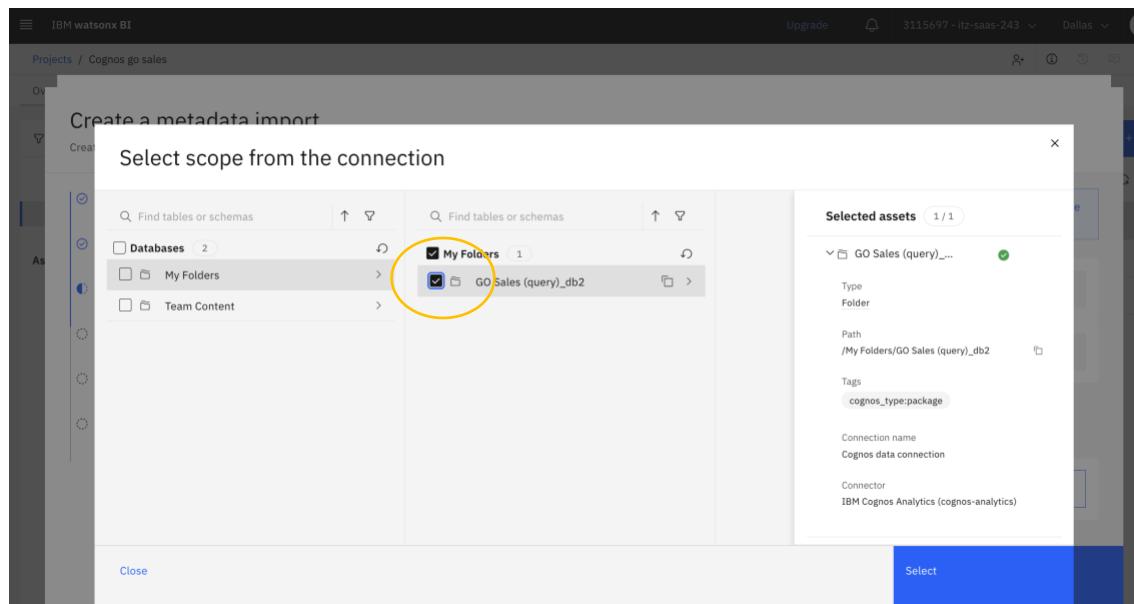


14. Browse to: My Folders > GO Sales (query)\_db2

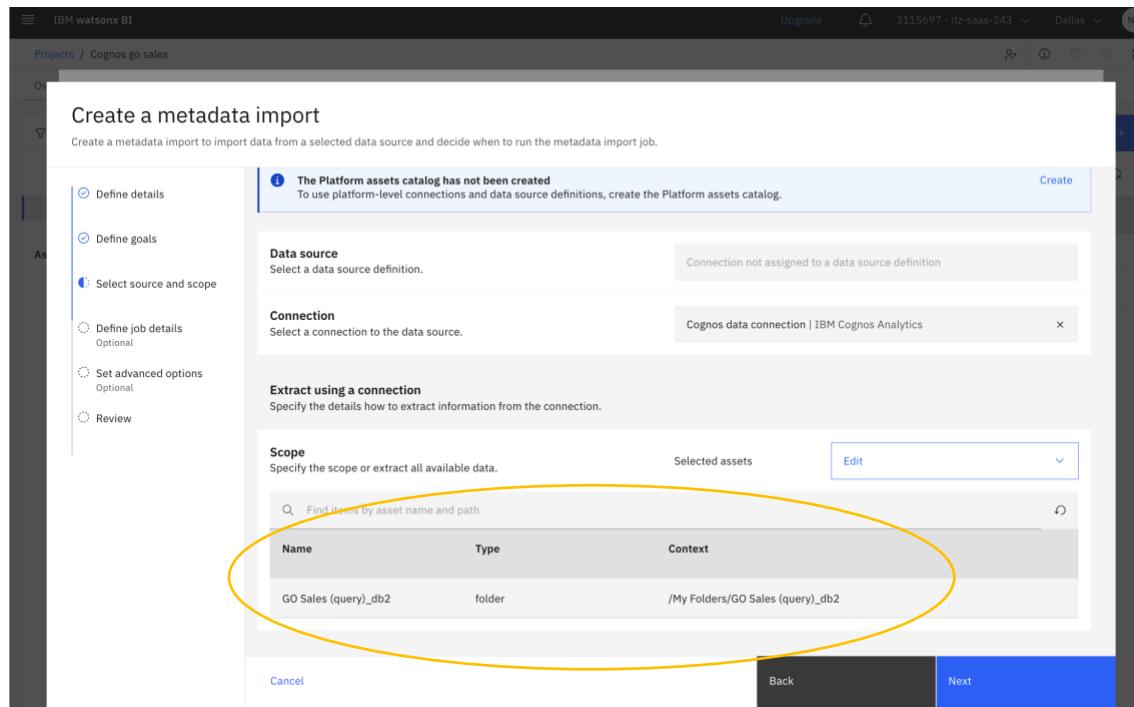
Make sure to click the “>” to navigate and not click the check box of each that will select everything in the directory. Click the check box next to “GO Sales (query)\_db2” and click “Select”.

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Note: do not click “My Folders” nor “Team Content” as it would trigger more data to be selected than necessary for this lab.

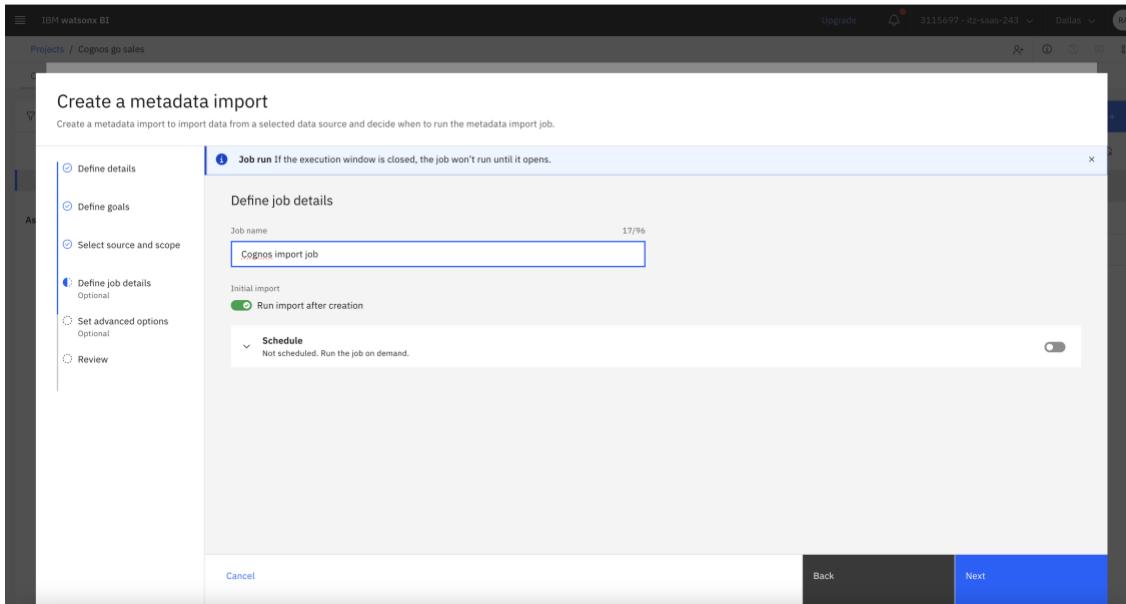


15. Verify that the Scope of your asset shows as “Go Sales (query)\_db2”. Click “Next”.

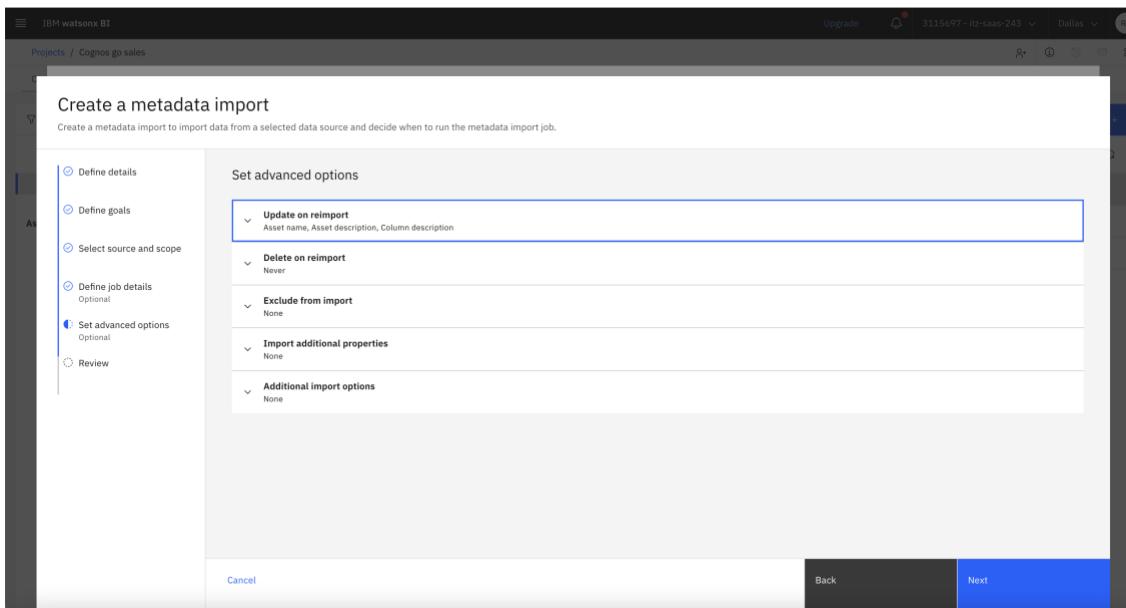


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16. Verify the job name and click Next.



17. Click Next on the “Set advanced options” screen.



18. Click “Create” to start the metadata import the Cognos semantic model.

# IBM TechXchange

Create a metadata import

Create a metadata import to import data from a selected data source and decide when to run the metadata import job.

Review

Details

Metadata import name  
Cognos import

Goals

Import assets

Import target  
This project

Source and scope

Source (Technology)/Connection  
Cognos connection

Scope to import asset metadata  
Paths: /Team Content/version 06/GO Sales (query)\_db2

Job details and schedule

Job name  
Cognos import job

Initial import  
Run import after creation

Schedule  
Not scheduled. Run the job on demand.

Advanced options (Import assets)

Update on reimport  
Asset name, Asset description, Column description

Cancel

Back

Create

19. The metadata import will take several minutes.

IBM Watson BI

Projects / Cognos go sales /

Metadata import in progress. Cognos import is currently importing from cognos data connection.

Cognos import

Imported assets  
0 assets

Name Asset type Format Context Last imported Status

Importing assets

This might take a while. You can leave this page, do other work during this process, and return later. If you stay on this page, click Refresh to update the list of imported assets.

About this metadata import

Description

Import details

Goal  
Import assets

Connection  
cognos data connection

Scope to import assets  
Assets: 1

Import target  
Cognos go sales

Job details

Job name: Cognos import job

Last run: Run 1

Aug 22, 2025, 05:32 PM

View metrics

Schedule

No schedule configured

Advanced options

Update on reimport  
Asset name, Asset description, Column...

Related assets

Cognos import job

Tags

No tags added yet.

20. Wait until the metadata import is complete. You will see a notification indicating that the metadata import is complete. Click on “Go Sales (query) \_db2” to open the semantic model asset.

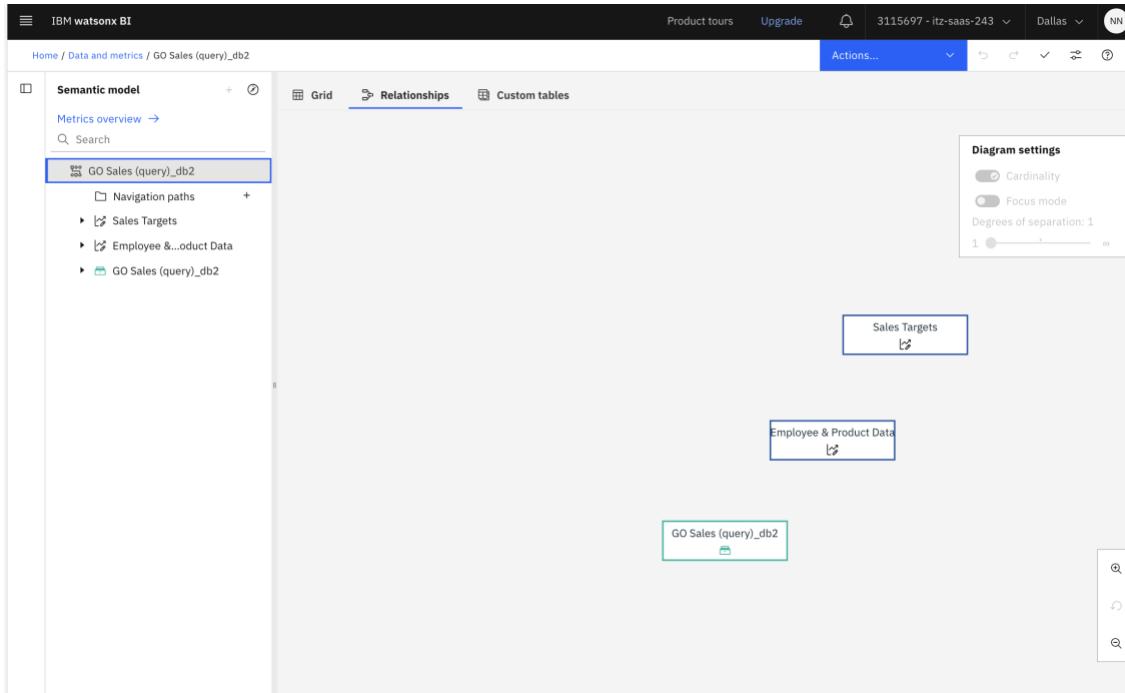
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The screenshot shows the IBM Watson BI interface for a 'Cognos import' project. A green notification bar at the top indicates 'Metadata import complete. 1 assets were processed successfully.' On the left, a table lists 'Imported assets' with one item: 'GO Sales (query)\_db2'. This asset is highlighted with a yellow oval. To the right, there are sections for 'Description', 'Import details', 'Job details', and 'Schedule', along with a 'Reimport metadata' button.

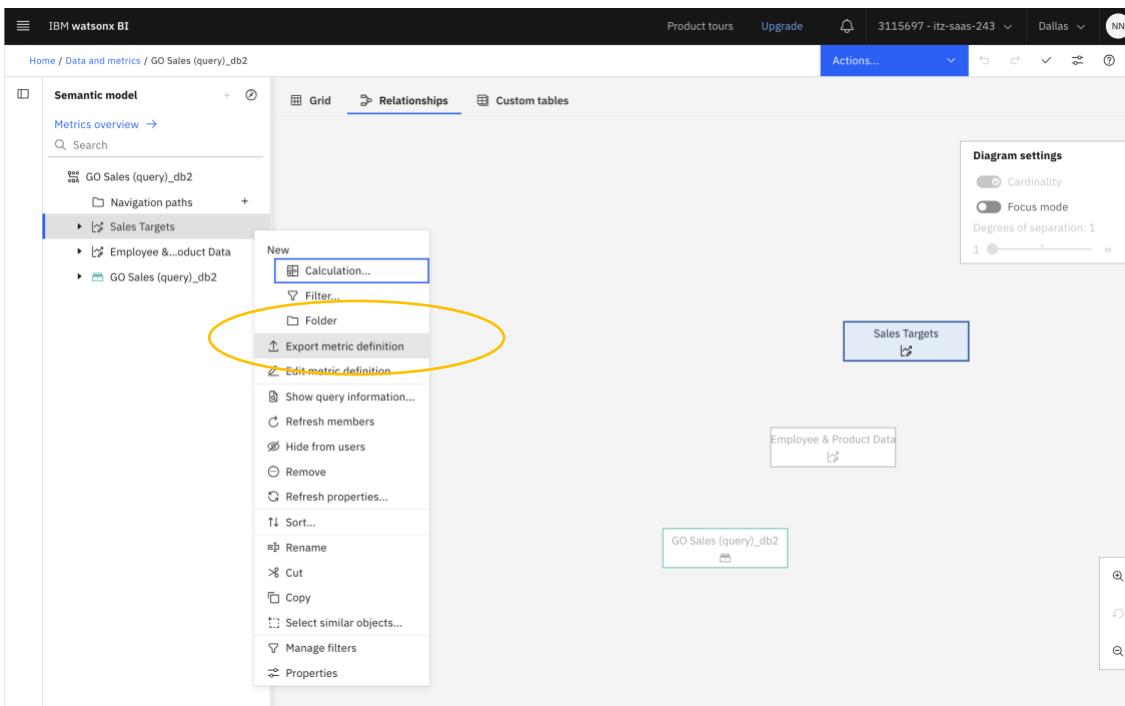
21. You may see a pop-up window to guide you on reading documentation for Metric definition. If you see this window, you can close it to proceed to next step.

The screenshot shows the 'Semantic model' page for the 'GO Sales (query)\_db2' model. A central modal window titled 'Advanced mode' provides information about metric definitions and export options. The background shows navigation paths and relationships within the semantic model.

22. On “Semantic model” page, you will see the “Go Sales (query)\_db2” semantic model that you imported from the Cognos Analytics FM package.



23. Right click on one the metric “Sales Targets”. Click “Export metric definition”. This action will create the metric definition data asset and start enriching the data so that IBM watsonx BI can use it to answer questions.



# IBM TechXchange

24. Click “Metrics overview” to go to “Data and Metrics” page.

The screenshot shows the IBM Watson BI interface. On the left, there's a sidebar with a 'Semantic model' section containing a 'Metrics overview' link, which is circled in yellow. Below it is a tree view of 'Sales Targets' with nodes like 'Sales target', 'Sales staff', 'Products', 'Time', 'Employee & Product Data', and 'GO Sales (query)\_db2'. The main area has tabs for 'Grid', 'Relationships', and 'Custom tables', with 'Relationships' selected. A blue 'Actions' button is at the top right. A notification bar at the top right displays three messages: 'Metadata enrichment started' (green checkmark), 'Success' (green checkmark), and 'Info' (blue info icon). The bottom right corner shows navigation icons for search, refresh, and others.

25. On “Data and Metrics” page, you will see the metric definition and its status (Enriching). The enrichment will take few minutes. As you wait, you can explore the properties of the metric definition and its content.

This screenshot shows the 'Metrics overview' page. The 'Metrics overview' link in the sidebar is circled in yellow. The main content area shows a 'Sales Targets' metric definition with a status of 'Enriching'. To the right, there are sections for 'Generate visualizations', 'Build visualization', 'Publish', and 'Advanced mode'. At the bottom, it says 'There are no visualizations for this metric.' The right side of the screen includes a search bar, a metrics count (1), a visualization count (0), and other navigation icons.

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26. Once, the enrichment is complete, you can start trying question.

The screenshot shows the IBM Watsonx BI Metrics overview interface. On the left, there's a sidebar titled 'Metrics overview' with a single item: 'Sales Targets' (status: Ready). The main panel has tabs for 'Generate visualizations', 'Build visualization', 'Publish', and 'Advanced mode'. Below these tabs, it says 'There are no visualizations for this metric.' On the right, there are search and filter options ('Metrics 1') and a 'Visualizations 0' button.

27. Right click on the metric, and click “Try in conversation”

This screenshot is similar to the previous one, showing the Metrics overview page. A context menu is open over the 'Sales Targets' metric. The menu items are: 'View details', 'Generate visualizations', 'Build visualization', 'Try in conversation', and 'Delete'. The 'Try in conversation' option is highlighted with a yellow oval. The main panel still shows 'There are no visualizations for this metric.'

28. You can explore these questions:

Show me the top 5 products in sales

What are the top performing regions for product type Eyewear?

Which region leads in all sales?

Which product type contributed the most to total sales in that region?

# IBM TechXchange

What are the sales in Asia Pacific?  
What are the sales in Germany?  
Show me total sales for all regions by year  
Who is the sales staff with the highest total sales?  
Which organization had the least sales?  
Show a line chart sales by month and year  
Show a heatmap of all sales by product line and type

## 5 Conclusion and next steps

Congrats! If you made it this far, you have explored some of the tools available in IBM BI portfolio!

### 5.1 Implement a similar solution in your organization

If you'd like to start using Cognos Analytics in your organization, you can check out the following ways to get started:

- Cognos Analytics 30-day trial
- Cognos Analytics pricing
- Contact our sales team to book a discussion or demo

Thank you for your interest and for taking the time to learn about AI with Cognos Analytics and.