ibi Summit 2026

Introducing AI Assistant

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Session Agenda

- Why AI Assistant?
- What does it do?
- How does it work?
- When can I get it?
- Q&A



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We all have a lot of questions...

POWER USERS

- What happened to that report I was working on yesterday?
- How is a workspace different from an application folder?
- Are the DSML services running?
- What data sources are available to me?

ANALYSTS

- What is this data really telling me?
- What changed to make this number so much higher?
- How can I get more detail about sales in the western region?
- Remind me how to interpret a box plot...

DEVELOPERS

- This FOCEXEC has been around since 1982. What does it really do?
- How can I add a new dimension to this chart?
- Where is this error coming from, and how do I fix it?

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ibi AI Assistant has answers!

POWER USERS

- Conversational search and navigation
- Interactive guidance for:
  - Navigation
  - Administration
  - Content creation

ANALYSTS

- Get more from the data.
- Explain the content of the dashboard.
- Discover patterns.
- Drill down for a deeper understanding.

DEVELOPERS

- Intelligent code generation and syntax assistance for developers.
- Explain complex FOCEXECs.
- Fearlessly edit legacy code.
- Uncover hidden problems.

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Introducing ibi AI Assistant

- Familiar Chatbot Experience
- Deep WebFOCUS Expertise
- Agentic Workflow that integrates with a choice of LLMs
  - Cloud-Based (bring your own)-- so far, we support:
    - Claude
    - Gemini/Vertex
    - OpenAI
    - Copilot

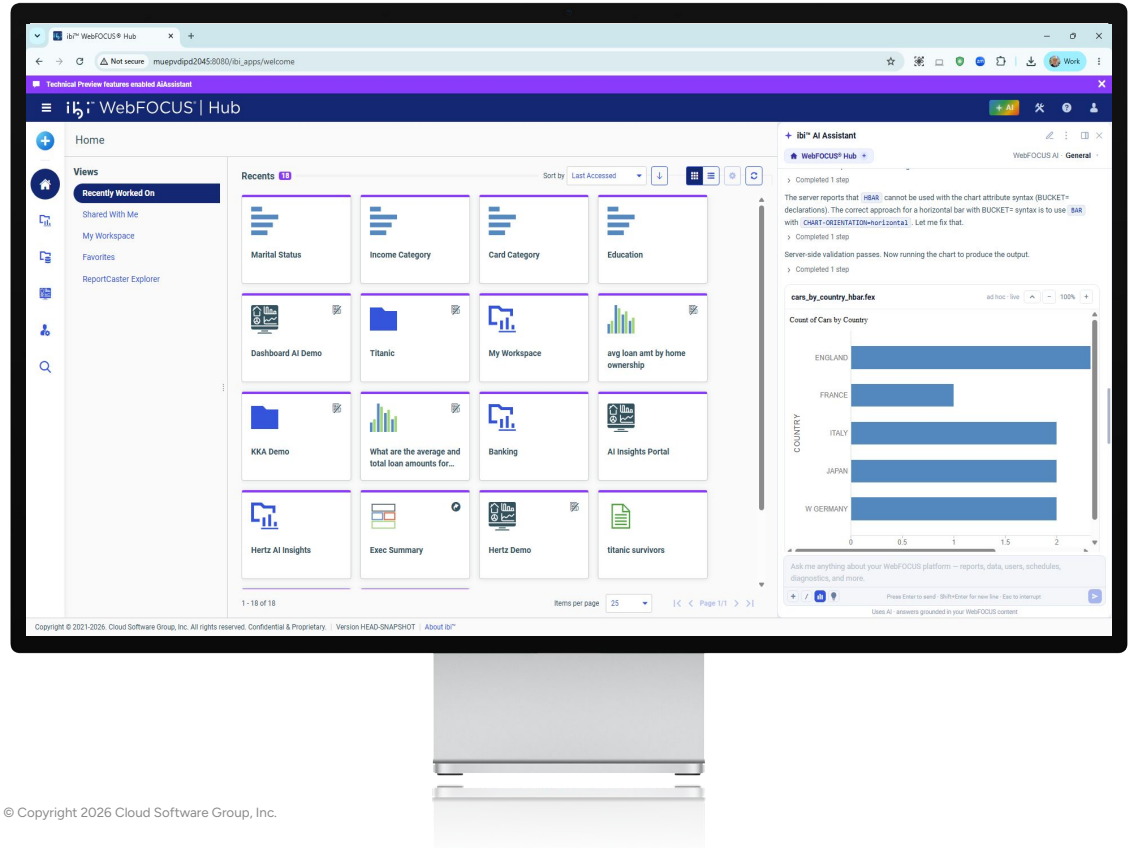
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What can it do?



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ibi AI Assistant in the Hub



Content Generation & Execution: Users can automatically generate custom WebFOCUS content, including reports and charts, from plain-language requests and execute them immediately to view live results.

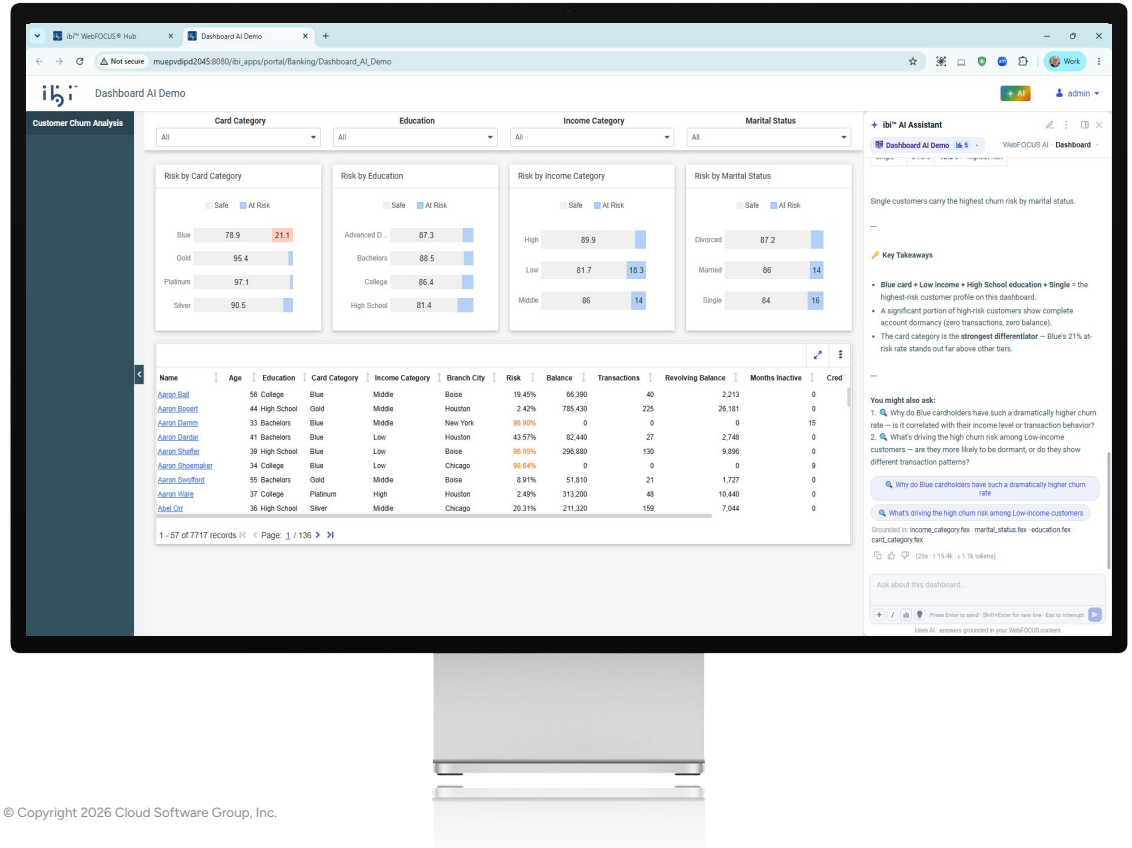
Interactive Platform Help & Documentation: The assistant answers ongoing platform help and how-to questions by contextually querying official WebFOCUS documentation. It provides step-by-step guidance on interface usage, feature configurations, and Hub management, such as personal workspace layouts and toolbar options.

Ecosystem Health & Diagnostics: Administrators can verify the operational status of critical environment infrastructure in real time, executing system health checks across components like the Reporting Server, Solr search engine, and ReportCaster.

Navigational Acceleration: The interface streamlines routine navigational workflows by enabling users to quickly locate and list recently modified objects, browse active repository domains, and access pinned favorites through conversational commands.

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ibi AI Assistant in a Portal



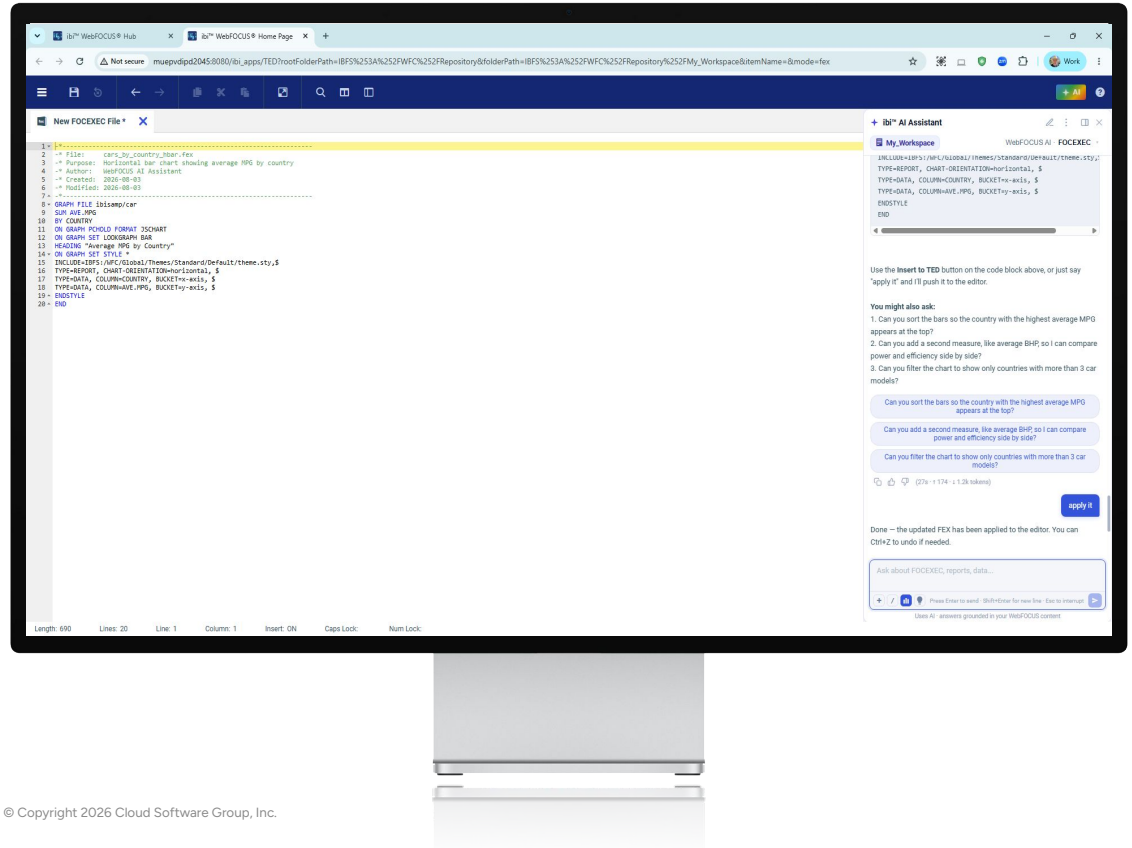
Tier 1 – What happened? (Descriptive Analysis): The assistant contextually scans active portal data to summarize metric changes. It identifies top or bottom revenue categories, spots year-over-year (YoY) growth trends, flags seasonal spikes, and calls out data anomalies.

Tier 2 – Why did it happen? (Diagnostic Insights): It drills down into the data using available dimensions to discover the root causes of metric movements. By executing background queries and pattern recognition routines, it isolates the specific sub-segment that explains the largest share of data variance.

Tier 3 – What should be done? (Prescriptive Actions): It applies business logic heuristics and risk/opportunity framing to prescribe tactical recommendations based on observed trends, indicating potential upsides or system constraints if current patterns continue.

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ibi AI Assistant in Text Editor



Automated Code Authoring & Completion: Developers can describe a new report in plain English to automatically generate FOCEXEC procedures.

Syntax Validation & Optimization: The interface natively validates FOCEXEC syntax for compliance with WebFOCUS guidelines and runtime requirements. It can automatically optimize unoptimized scripts, rewriting the code live on screen.

Intelligent Debugging & Quick Actions: Equipped with dedicated toolbar options including Fix Errors and Complete FEX, the assistant modifies existing procedures by correcting flagged errors and refining the logic to precisely match user intent.

Interactive Explanation Engine: Using the Explain FEX feature, the assistant overlays natural language explanations across technical processes, breaking down specific FOCEXEC clauses to serve as an educational and tutoring tool for developers.

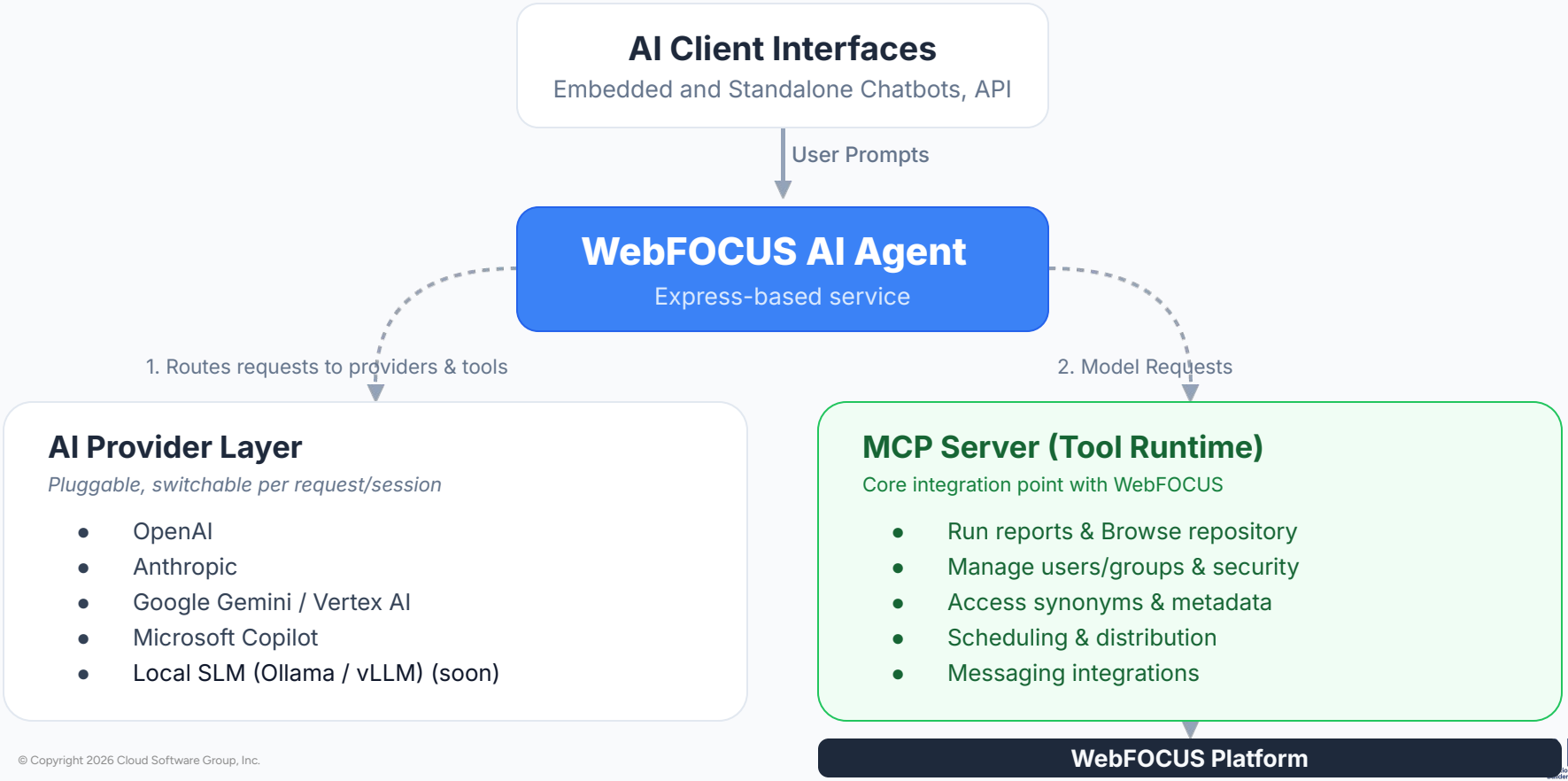
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How does it work?



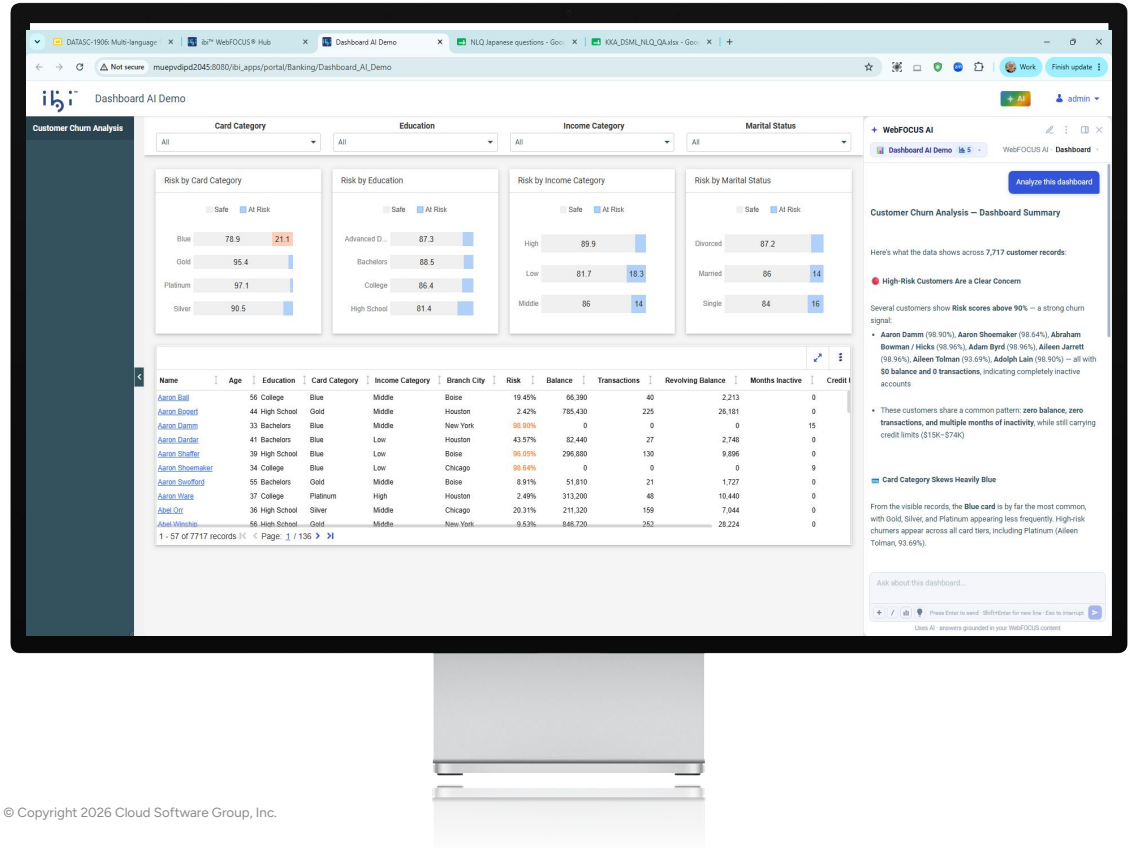
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WebFOCUS AI Assistant Architecture



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Chatbot at work



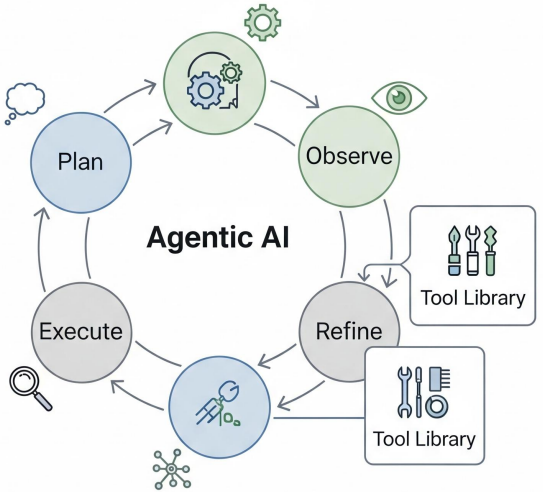
- Infers persona from context and input: in this case, we're in a portal, so the chatbot functions as an analyst.
- Features are familiar from other chatbots like Gemini or ChatGPT.
- Create "experts" with domain-specific knowledge.

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The Agentic Workflow

Create a horizontal bar graph showing sales by country using the Car file...

1. Plan
2. Observe
3. Refine
4. Execute
5. Iterate as needed



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How does GenAI fit?

- The “cognitive engine” in the agentic workflow
- Constructs the “plan”
- Refines the plan
- Options:
  - BYOT (Bring your own token)
    - Configure AI Agent to use the LLM you work with
    - Most major options are already supported
  - Zero Token (coming soon)
    - Locally hosted model
    - GPU and hardware requirements
    - Some limitations

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MCP: The Toolbox

- Model Context Protocol: A standard way to give an LLM specialized knowledge and capabilities
- Over 200 tools that help the AI:
  - Understand *how* to do things in WebFOCUS
  - Then *Do* things in WebFOCUS
- AI Assistant can't do anything you can't do. The agent always has the security context of the user!
- You will always be asked to confirm before AI Assistant changes anything on your behalf.
- MCP runs in-process with the AI Agent– not available externally.

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Ask an Expert

- Experts are designed to handle specific types of job.
- Each expert uses only the tools required for its area.
- This reduces the size of the context passed to the LLM, improving accuracy and saving precious tokens.
- Many Built-in experts, including:
  - Diagnostics
  - FOCEXEC Author
  - Interact & Analyze
- Create your own expert!

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Build your own Expert!

Instructions

- Create a prompt for the expert.
- What is it for?
- What specific things should it know?

Knowledge

- Which doc library will it need?
- WebFOCUS?
- FOCUS Language?

Tools

- Which specific tools will it need?
- Is this an analyst?
- Or an admin?
- Or an author?

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When can I get it?



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Timeline: Release Roadmap

Our release roadmap delivers rapid AI and semantic innovations.

9.3.8
(August 2026)

- AI Assistant GA
  - Hub
  - Portal
  - Language
- BYO LLM only

9.3.81
(October 2026)

- Local SLM option
- Designer Compatibility
- User Management
- ReportCaster

9.3.9
(Q4 2026)

- Embedded Chatbots for Designer and ReportCaster
- Enhanced Explore Data
- Intelligent Business View Editor

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